

Work Project presented as part of the requirements for the Award of a Masters Degree from NOVA –School of Business and Economics

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**Consulting project for the marketing oil department of Galp Energia:**  
**Map the LPG bottled customer journeys regarding home-delivery service nationwide and recommendations to improve the client's experience**

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Consulting lab carried out under the supervision of: Professor Constança Monteiro Casquinho

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## Acknowledgments

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Firstly, it is important to acknowledge that the success and relevance of our findings and conclusions resulted from a combined effort between the students' team, Galp's team and Nova SBE representatives.

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Last but not least, a word of gratefulness to our family and friends for the gratifying, motivating and uplifting permanent support throughout the entire project.

The Consulting Lab Project was thought to provide an enriching learning experience for the students before entering in the job market.

## Consulting Lab

### Overview

The Management Consulting Labs represent a meaningful opportunity for the team to embrace a real-life consulting project for a truly relevant client, such as Galp. The group was challenged to define the current LPG bottled gas customer journey, that will ultimately result in the identification of pain and pleasure points for each type of client - personas. During the 3 months' project, the team worked within the company headquarters, having the opportunity to collaborate directly with the company's personnel - strong syndication - that had, in our opinion, a key role in our project development and final output.

### Objectives

Deepen theoretical and purely academic concepts with a hands-on consulting project.  
Develop specific methodologies and skills such as syndication, empathy, data analysis and presentational qualities.  
Embrace and understand the company's corporate culture through a daily basis interaction.  
Deliver real value to Galp, from a independent and unbiased perspective.

### Advisors

#### Advisors:

- Eng. João Torneiro
  - Eng. Alexandre Machado
  - Dra. Isabel Colaço
  - Dra. Susana Martins
  - Eng. Gilberto Gonçalves
  - Eng. Lázaro Pires
  - Dra. Susana Quitério
- Advisor:**
- Prof. Constança Casquinho



### Team



Alice Barros



Ana Carolina  
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Francisco  
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# Executive Summary

Galp's well-known dimension and reputation oblige the company to deeply recognize its customer base needs, as well as to understand the clients' perspective regarding their experience.

## Executive Summary - The Business Context

### Company

Galp is the **biggest energy company operating in the portuguese market** and has an active presence in 11 countries, with approximately 6.500 employees. Founded in 1999, the company is the singular oil and natural gas integrated operator in Portugal, being divided in three business segments: Exploration & Production, Refining & Marketing and Gas & Power. Galp **explores and produces oil and natural gas**, delivering and supplying energy, everyday, to millions of people worldwide.

### The Project

The project is developed for the **Refining & Marketing business segment**, focused solely in the **"Iberian Oil and Marketing Department"**. This department is responsible for Galp's products and services' marketing initiatives, aware of and based on customer centric principles.

**Galp is the prominent leader in the portuguese LPG bottled market** but, nonetheless, the company understood, roughly two years ago, the **importance of weighting the customer perspective** and main interests while interacting with the company. The "Voice of the Client" team was hence created to ensure the total compliance between Galp and the clients' expectations. Taking this into account, the department challenged the team to **design the current customer journey of the LPG bottled gas' clients of the home-delivery segment**, mapping every single step of the process, since the order until the payment. This will help to analyze a **nearly unknown group of clients** (due to lack of database), supporting Galp's future initiatives to retain them and attract new ones.

The fundamental objective of the project is to improve the customer experience of Galp's clients, by identifying their current and most relevant touch points, suggesting actions to mitigate them.

## Executive Summary - Situation and Challenge

### Aim and Objectives

**Goal:** To ensure the retention of Galp's LPG bottled customers and acquire new ones.

**Method:** Determine the present LPG bottled customer journey (home-delivery segment) and suggest recommendations, labelled as Quick Wins or Challenges, to redesign an improved customer journey, enhancing the clients' experience and satisfaction.

#### Objectives:

- Understand the LPG business and the dynamics of the sector.
- Find the different existing customer journeys for the home-delivery LPG bottled gas clients.
- Associate Personas to the identified customer journeys and analyze each one's pain and pleasure points along every step of their journey.
- Propose initiatives to mitigate or soften the pain points and boost the pleasure points.
- Improve the customers' experience by redesigning their journey.

### Challenges

- Who are the LPG bottled customers?
- What is the best methodology to map the LPG bottled customer journey (home-delivery segment)?
- Which are the present customer journeys?
- How to improve the experience for the clients?

The team suggests 74 actions, divided into quick win initiatives and challenge initiatives, to mitigate the 21 pain points identified, that consequently will increase the customer satisfaction levels.

## Executive Summary - Recommendations



Process Recommendations	Order	Wait	Delivery	Installation	Payment	Post-Purchase
# Pain Points	4	2	4	2	3	6
# Quick Win Recommendations	9	5	14	3	3	8
# Challenge Recommendations	4	5	2	2	0	5
# Impact in Pain Points [a]	75%	77%	77%	80%	29%	40%

[a] Average impact of the recommendations in the pain point's resolution, by customer journey phase

[b] Some of the recommendations suggested to the "GasOnline" Portal are also included in the Process

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# 1. Theoretical Background

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- 1.1. Customer Centricity
- 1.2. Creation of Personas
- 1.3. Customer Journey Mapping

The design of the customer journey and its specific personas help to address each different type of client through more adequate means, contributing to a strategy development focused on the client and his expectations and willingness.

## Theoretical Background (1/2)

### Customer Centricity

Nowadays, offering good products or valuable services and expect sales to increase, as a result, is becoming insufficient for companies to remain competitive in the business. **The relation between firms and customers is progressively more relevant**, whereas the strategies **focused too much on the product fail to deliver the extraordinary value** the customer expects. By embracing a customer centric approach, the companies start to prioritize the **customer satisfaction and happiness**. Providing an **outstanding experience to each client stands as driver to increase profit and gain competitive advantage**<sup>29</sup>. To become customer oriented, it is paramount to deeply understand the customer's needs and expectations, thus ensuring the needed internal developments, strategies and marketing actions to completely fulfill them<sup>30</sup>.

### Personas

A persona is a **fictional representation of the client, based on data about the existing ones**. Usually, its creation emerges from a customer research that lastly incorporates the needs, objectives and behavioral patterns of a specific type or group of clients. A well-defined persona **features some basic data (name, age, region, etc) as well as a story** that summarizes the client's usual **interaction with the product or service**, offered by the company<sup>31</sup>.

It has been **increasingly important for the companies to deeply know its own clients**, so that improvements and upgrades can be implemented, to answer their everchanging needs and expectations. By defining personas, the companies are **able to discover the ideal customers, their current consumption patterns and likewise their specific demands**. The process eventually guides product and service development and grants alignment across the company.

The design of the customer journey and its specific personas help to address each different type of client through more adequate means, contributing to a strategy development focused on the client and his expectations and willingness.

## Theoretical Background (2/2)

### Customer Journey Mapping

The Customer Journey Map (from now on designated as CJM) is a **detailed diagram that illustrates the group of interactions between the company and the clients**, arising from their willingness to achieve a specific objective through the contact with the first. This group of interactions is designated as touch points, that represent stages where the customer experiences specific emotions<sup>32</sup>.

To build a truly relevant CJM, it is important to **remain loyal to the customers' vision, representing clearly their perspective and objectives**. Nonetheless, it is paramount to observe and document the customer emotions during the experience and to highlight the journey's moments of truth - the most important moments of interaction for the client.

**The CJM is built mainly to understand the clients' perspective regarding their expectations when interacting with the company**, as well as to **obtain knowledge and insights about the customer**. The interpretation of the *touch points* allows to identify the contribution level of each customer journey step to the customer experience satisfaction, either creating or destructing value from the customer's perspective. Ultimately, **the CJM intends to identify the pleasure and pain points**<sup>33</sup>.

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- 2.1. General Methodology
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The project presupposes a country-wide analysis from the customer perspective, regarding the home-delivery purchase channel, focusing on the purchase moment.

## Methodology - General Methodology (1/2)

### Scope of the Project

#### Geography

The project aims to analyze the reality with a **national scope**. First the regions and then the correspondent cities are **chosen**, based on **sales volume and geographic area representativity**. Porto, Braga, Aveiro, Lisboa, Setúbal and Portalegre confer the required coverage for the findings' significance.

#### Location

**The first resellers facilities** - specialized stores and warehouses - **are the most appropriate locations to develop the project**, since they are the only ones directly in contact with the final consumer. The most relevant first line reseller - **offering home delivery service** - per region was identified and the team works alongside them during specific weekdays, following the distributor in the delivery.

#### Focus

**The purchase is the selected interaction moment** for analysis, since it is the one giving direct insights regarding clients' satisfaction and brand loyalty. **The project time-frame** (3 months) **limited** the viability to **analyze the other relevant moments**, besides the purchase. Futurely, the decision moment would be relevant to consider as an add-on and complement to the present study.

#### Channel

**Home delivery service is the only channel deeply analyzed**, due to insufficient observations and data regarding the other alternatives - specialized shops and points of sale (supermarkets, gas stations and small businesses). The lack of observations in those places reflects the extremely high temperatures during October and November, causing a decrease in the gas bottles sales.

The methodology is divided in three main stages: the diagnosis, that consists in the context and theoretical background, analysis of the LPG bottled customers and their journeys and recommendations to implement.

## Methodology - General Methodology (2/2)

### 0. Review

- Adjust the methodology applied in the previous consulting project.

### 1. Diagnosis

*Context and Theoretical  
Background*

- Internal Analysis;
- External Analysis;
- LPG Bottled Benchmark.

### 2. Analysis

*Analysis of the LPG bottled  
customers*

- Collect data on-site;
- Identify the customer journeys;
- Cluster analysis;
- Select the customer journeys;
- Create personas;
- Identify the pain and pleasure points;
- Elaborate the Customer Journey Map.

### 3. Recommendations

*Actions to implement*

- Brainstorming;
- Review, categorize and select the actions.

Firstly, it is important to understand the dynamics of both the company and the external environment where it operates - internal and external analysis.

## Methodology - Diagnosis (1/2)

### Internal Analysis

**Objective:** Understand Galp's strengths and weaknesses, in the LPG Bottled market.

**Method:** The research includes an **analysis of the structure and operations** of Galp in the LPG Bottled market, to understand, in depth, **how the business operates** and the **company's position in the market**. The subjects covered are the Galp's performance in the market, its customer base, infrastructure and current product offering.

#### Main Activities:

1. Current offer analysis
2. LPG Bottled Tracking
3. "Programa Estrela" scrutiny
4. "GasOnline" Portal analysis

### External Analysis

**Objective:** Identify the external factors that affect the company's performance and future strategies in the LPG Bottled market.

**Method:** The external analysis includes an **overview of the industry and market trends** (demographic, technological, regulation and consumer patterns) that can impact the company's performance and generate new opportunities and/or threats in the market.

#### Main Activities:

1. Market analysis
2. Industry trends' identification
3. National market dynamics' interpretation
4. International benchmark

To better understand the LPG Bottled market and to discover the best innovations and practices in the business, it is wise to perform a national and international benchmark, that will also support the final recommendations.

## Methodology - Diagnosis (2/2)

### Bottled LPG Benchmark

**Objective:** Understand the LPG Bottled market, both national and international, in order to review the company's current position regarding competitors, as well as ascertain the space for improvements to enhance the customer experience.

**Method:** Divide the benchmark analysis in two fields, one regarding **national competitors** and the other concerning **international companies' best practices** and **innovative solutions**. The national analysis incorporates information publicly available and specific research on the service provided by the competitors. The international analysis contemplates a selected group of international companies, leaders in their own market, and the scrutinization of their practices through web research.

#### Main Activities:

1. **Companies targeting**
  - National market analysis and identification of the major portuguese players, based on market shares.
  - International market analysis and identification of the major players, based on a survey to international students.
  - Compilation of the most consistent examples based on location (european and non-european) and information available online.
2. **Web-research**
  - Deep analysis of the websites and apps offered by the companies identified.
3. **Resume and Comparison**
  - Selection of the most pertinent examples, regarding implementation possibilities and outstanding innovation levels.



The in-field observations largely contribute to identify the customer journey and the touch points, since the clients are observed in their own context and environment, without any kind of intervention or influence.

## Methodology - Analysis (1/7)

[1] Detailed information on this topic can be found in appendix 2.1.1.

### Data Collection - In-field Observations

**Objective:** The goal of the first phase of data gathering is to identify the client's journey, as well as the main touch points. The observations also help to establish priorities to further address in the telephone interviews.

**Method:** In the **observations** phase, it is important to understand which are the customers' main steps in the process, to **perceive their interaction with the distributor**. In the home delivery service, to observe the client, it is essential to accompany the employees in the distribution car, going alongside them from the beginning, when they load the truck, until the gas delivery is completed. However, in order to **not interfere on the client's journey**, the group cannot interact with them, acting only as an **external observer**.

#### Main Activities:

1. Creation of the observations' grid<sup>[1]</sup>
  - Create a list of the relevant steps experienced by the customer.
2. Observations on-site
  - Track the client's actions and interaction with employees.
3. Data analysis
  - Insert data on the SPSS program.
  - Identify the customer journey.

The findings from the quantitative research are strongly connected to the interview outputs, which enable a more detailed and profound interpretation of the clients' perspective and opinions regarding their experience.

## Methodology - Analysis (2/7)

[2] Detailed information on this topic can be found in appendix 2.1.2.

### Data Collection - Interviews

**Objective:** Understand the pain and pleasure points of the customers and collect information to create personas.

**Method:** In order to get a deeper understanding of the **customers' feelings and opinions**, it is **necessary to interview** them. The interviews to **home delivery clients are made by phone**, as it is nearly impossible to perform it personally at the clients' home. In order to collect the phone numbers, the resellers, involved in the observations phase, are asked to provide thirty random contacts of their home-delivery clients.

#### Main Activities:

1. **Collect client's contacts**
  - Send an email to the resellers requesting thirty random phone numbers.
2. **Creation of the interviews' guide**<sup>[2]</sup>
  - Decide which data is relevant to gather.
  - Define and select the relevant questions.
3. **Interviews**
  - Register customers' answer, highlighting their pleasure and pain points and opinions.
4. **Data analysis**
  - Insert data on SPSS.
  - Identify the pleasure and pain points.

The data collected from the observations and interviews is inserted in the SPSS Program, in order to create clusters of customers with similar journeys and behaviours.

## Methodology - Analysis (3/7)

[3] Detailed information on this topic can be found in appendix 2.1.1.

### Cluster Analysis<sup>[3]</sup>

**Objective:** Segment the data collected into groups of customers with similar behaviors and customer journey.

**Method:** To increase the statistical significance, the data regarding the observations and interviews must be jointly inserted in the **SPSS program**. However, it is necessary to make a previous selection of the **common variables** between the **two phases**, since not all the variables are collected in both phases. Furthermore, to **create the clusters**, the group has to make a second selection of the variables, choosing the ones related to the customer's behaviour in the buying process. In the **hierarchical cluster analysis**, several simulations are elaborated, using different clustering methods, to find the best one. After analyzing the **dendrograms** of each test run, the group decides to proceed with the **Ward's method**<sup>1</sup>. The next phase consists in determining the number of usable clusters. This sorting is necessary because the agglomeration in the hierarchical method is not done gradually<sup>2</sup>. For that, the group examines the final dendrogram and the fusion coefficients, which measure the distances at which the clusters are being aggregated<sup>3</sup>. In conclusion, the group deems **nine** clusters as fitting.

#### Main Activities:

1. Insert data in the SPSS program
2. Select variables to be used in the creation of the clusters
3. Choose the best cluster aggregation method
  - Run simulations and analyze the dendrograms of each method.
4. Choose the number of clusters to be analyzed
  - Interpret the dendrogram and the fusion coefficients.

The merely statistical results from SPSS shall be aligned and interpreted given the real context observed during the in-field observations.

## Methodology - Analysis (4/7)

### Select the customer journeys

**Objective :** Identify the most relevant customer journeys and match them with the clusters obtained in the SPSS program.

**Method :** The customer journey consists of **all the stages where the clients interact with the company**. In the field-research, the group analyzes which are the customer experiences at each individual touchpoint. Afterwards, **customers with similar journeys**, this is, who go through the same stages and experiences, are **grouped in different clusters in the SPSS**. However, since the **results** on the SPSS **are purely statistical**, the group needs to align it with the reality, which will result in the creation of personas. Among the existing journeys, the most significant ones are found based on the sample's representativity (with the higher percentages). The next step consists in **matching the customer journeys** selected **with the clusters** obtained in the SPSS. This phase results in the **selection of six** of the nine previous clusters and **five** customer journeys.

#### Main Activities:

1. **Analyze the clusters**
  - Identify behavioral patterns in the clusters obtained in the SPSS.
2. **Identify the most relevant customer journeys**
  - Calculate the percentage of each customer journey.
  - Select the most representative.
3. **Match the customer journeys with the clusters**
  - Determine which clusters belong to the relevant customer journeys.

Once the data is gathered and analysed, it is possible to create personas, that represent a group of customers with specific behaviors, for each customer journey.

## Methodology - Analysis (5/7)

### Create Personas

**Objective:** Create reliable and realistic representations of the most significant customer groups, so Galp can recognise them and, consequently, improve their customer experience.

**Method:** To build personas, it is necessary to perform an **extensive in-field research** to **ensure** that these will **accurately represent the LPG bottled consumers**. Given that, the personas' **creation** is based on the information gathered in the **observations and interviews' findings**. However, since the SPSS results are essentially statistic, the team needs to align it with the reality. Therefore, we can not take into account, only the individual values from each cluster, but also need to confront them with the other clusters and the aggregated sample. Hence, it is possible to **identify the pertinence of each characteristic** for the clusters, by looking at the disparity between the values.

#### Main Activities:

1. Analyze the clusters
  - Study the information gathered in the observations and interviews in each cluster.
2. Decide the relevant characteristics that will result in the personas

From the in-field and qualitative research, the customers' response regarding each step of the journey can be identified and categorized as positive or negative.

## Methodology - Analysis (6/7)

### Identify the pain and pleasure points

**Objective:** Comprehend the clients' degree of satisfaction over the diverse steps of their journey. This allows the perception of how the company is currently filling the customers' expectations, either by enlarging or damaging their value perception.

**Method:** **Identify the customers' positive** (pleasure points) and **negative** (pain points) **reactions during their experience** throughout the journey, based on their emotional responses to the service provided, in the in-field observations and phone interviews. Subsequently, the group determines the most applicable touch points in each persona.

#### Main Activity:

1. Qualitative information analysis
  - Understand the client's interactions (positive and negative) registered throughout the observations and interviews - label as pleasure or pain points.
  - Identify the most relevant and significant pleasure and pain points in general and per persona.

With the customer journeys selected and the respective personas, as well as their pleasure and pain points highlighted, the customer journey map is designed, reflecting the clients' experience throughout the process.

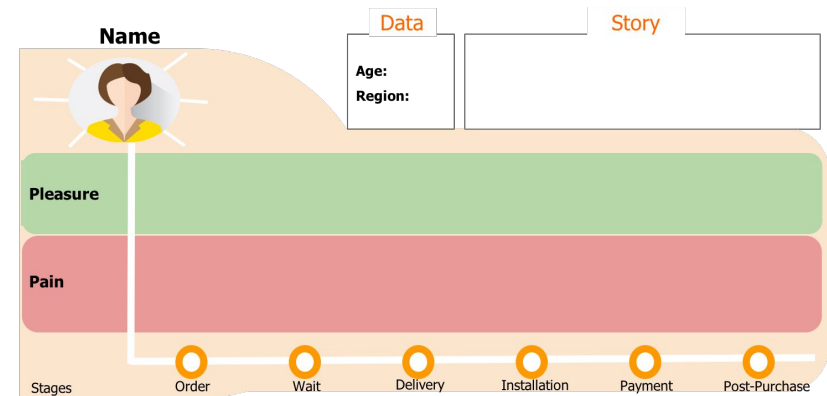
## Methodology - Analysis (7/7)

### Elaborate the Customer Journey Map

**Objective:** The Customer Journey Map will identify the steps that the customer experiences in the buying process of the bottled gas, with the respective pain and pleasure points allocated to each stage.

**Method:** A Customer Journey Map is a **visual interpretation of the overall story of the persona**, illustrating its relationship with the service.

The scheme of the LPG bottled's personas includes a section with their **key characteristics**, namely, their name, age and region, and a **short narrative** that **describes the nuances and details** associated with their customer experience. Furthermore, the **pain and pleasure points of the persona are identified** in each stage of the journey. The pleasure points are displayed in the green box and the pain points in the red one.



The final step in the project is to suggest actions to impact positively the customer experience. For that, the group needs to conduct a brainstorming session and to rate and select the best recommendations.

## Methodology – Recommendations (1/3)

[4] Detailed information on this topic can be found in appendix 2.2.1.

### General Methodology

**Objective:** The next step is to elaborate a list of actions that will improve the customer experience, maximizing the pleasure points and minimizing the pain points of the LPG bottled clients.

**Method:** In order to **generate the recommendations**, the group first has to **acknowledge** what are the **best practices in the national and international LPG Bottled market**, and then, apply the **metaplan methodology**<sup>[4]</sup> to find ideas to attenuate the pain points and replicate the pleasure points. Those are then analyzed and studied, with the involved areas in the project, so the **best ones** can be **selected**.

#### Main Activities:

1. **Brainstorming sessions**
  - Brainstorming session in group.
  - Brainstorming sessions with the commercial managers.
2. **Rating of the actions**
  - Categorization of the actions as challenge and quick win according to three criteria.
3. **Selection and validation of the actions**
  - Sessions with the involved areas in the project (LPG bottled, “Programa Estrela” and “GasOnline” Portal).



Once learned the context and existing possibilities in the market, it is possible to start generating possible ideas to solve the identified issues through creative but structured methods.

## Methodology – Recommendations (2/3)

[4] Detailed information on this topic can be found in appendix 2.2.1.

### Brainstorming in group

**Objective:** Elaborate a list of recommendations for every single pain point using the Metaplan methodology<sup>[4]</sup>.

**Method:** Break the main problem into singular parts and go efficiently straight to the point<sup>4</sup>. Thus, the first step is to divide the brainstorming session in a number of moments equal to the number of pain points of each persona, while each group member thinks in silence about solutions to mitigate it<sup>5</sup>. Having the ideas written on paper, they must be shared and divided by theme. This method allows the group to find diverse and **different ideas in a short period of time**<sup>6</sup>.

#### Main Activities:

1. Generate ideas for each pain point
  - Five minutes moments to think about solutions for each pain point and write them on paper.
2. Sharing and division of the solutions by theme

### Brainstorming with Galp's representatives

**Objective:** Get insights from commercial managers about the LPG bottled business and discuss solutions for the pain points.

**Method:** Discussion of all the pain points, in detail, and the best solutions to improve the LPG bottled customer journey. Moreover, the group also **discusses topics, with the commercial managers**, such as their relationship with the reseller, their business insights, regarding business trends, the emergence of new competitors and their opinion about the launching of the "GasOnline" Portal to order LPG bottled gas.

#### Main Activities:

1. Pain points discussion and respective possible solutions
2. Discussion of LPG bottled business
  - Business insights
  - New competitors
  - Resellers/ commercial managers relationship
  - Launching of the "GasOnline" Portal

The generated ideas must be selected according to specific criteria, identifying the ones with the most relevance and effect on the improvement of the clients' experience.

## Methodology - Recommendations (3/3)

### Actions' Rating

**Objective:** Categorize and evaluate the actions to find the ones that have more impact on pain points resolution.

**Method:** **Evaluation of every single action** resulted from the brainstorming sessions and **identification of the ones with the higher score** and more impact on pain points resolution by customer journey stage. The criteria used are the ease and cost of implementation and the impact of the idea implementation in the pain point resolution.

#### Main Activities:

1. **Actions' Evaluation**
  - Individual rating by each group member.
  - Sum of the individual scores.
2. **Actions' Categorization**
  - Ranking of the actions for each pain point.

### Actions' Selection

**Objective:** Selection and classification of the actions in quick-in and challenge.

**Method:** **Discussion with the areas involved** in the project (LPG bottled business, "GasOnline" Portal, "Programa Estrela") **about the pertinence of the selected actions and the possible cost and implementation constraints.** The result of these sessions is a final list with the validated actions (74), that must be split in quick-win (less expensive and easier to implement) and challenge (more expensive and difficult to implement).



1. Theoretical Background

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**3. Internal Analysis**

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3.1. Business Model

3.2. Current Offer

3.3. Galp's Resources

3.3.1. LPG Bottled Tracking

3.3.2. Galp Customer-Oriented Initiatives

Galp does not interact directly with the LPG bottled customers, acting only as a producer. The first line resellers act as distributors and have a very important role in the business model, due to their contact with the final consumer.

## Internal Analysis - Business Model

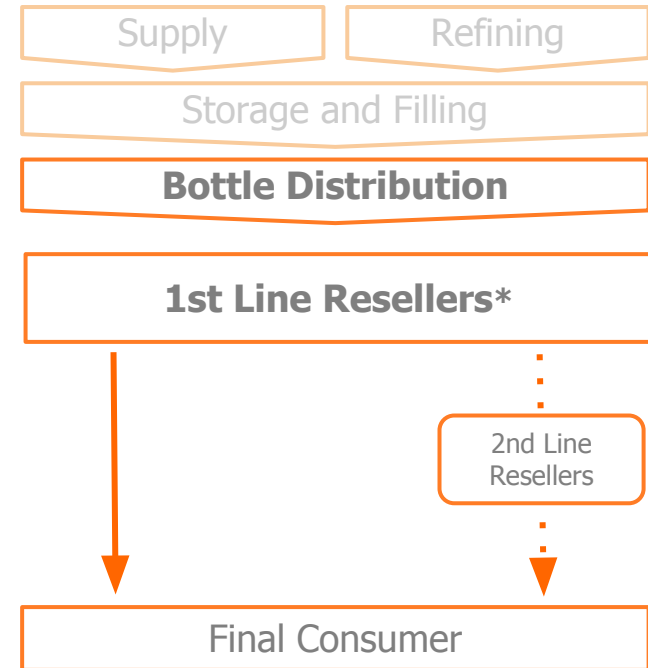
### Business Model

In Portugal, the LPG sector is limited to the segments of production (importation, refining and gas packaging), distribution and retail.

**There are four major producers and Galp has the largest market share**, with over 40%. However, **Galp does not interact directly with the consumers**, functioning exclusively as a producer. Bottles are **sold to the first-class resellers**, who consequently **commercialize them to the second-class resellers** (i.e, small retailers – supermarkets, grocery stores, home appliances stores, cafes, service stations, etc.) **or to the final consumer** in the various segments: household , catering, hospitality, industry, among others. <sup>15</sup>

Currently, Galp has 198 first-class resellers and 17.000 second-class resellers. <sup>22</sup>

The resale prices adopted by the resellers and retailers are freely defined by these economic agents and highly volatile among regions.



\*Each 1st line reseller is allocated to a different geographical area

Nowadays, Galp offers six different bottles of two different types of gas: butane and propane. Each one has different usages and answers different demands of the customers.

## Internal Analysis - Current Offer

### Current Offer - LPG Cylinders<sup>7</sup>

#### Butane Bottle



Specially suited **for domestic use** in **apartments** (cook and water and house heating), the traditional bottle has **13kg of gas** and ensures the safety levels required for in-home storage.

#### "Pluma" Bottle



Presented as the face of the new LPG bottles generation (2005), this **lighter bottle** offers **butane gas** alongside **innovative design**, being more adequate for some accessories (eg: heaters)

#### "Minigás" Bottle



Adjustable for the majority of the accessories sold in the market, the "Minigás" bottle aims to **support leisure moments** by lightning, heating and cooking wherever is needed.

#### Propane Bottle



Developed for **more intensive gas usage**, the propane **11kg** bottle addresses the needs of the catering and hospitality industry, being also indicated for houses' domestic use.

#### Propane Bottle



Offering the same propane as the 11kg bottle, the 45 kg propane bottle responds to **bigger houses, agricultural or small business needs**.

#### Propane Bottle (Liquid Phase)



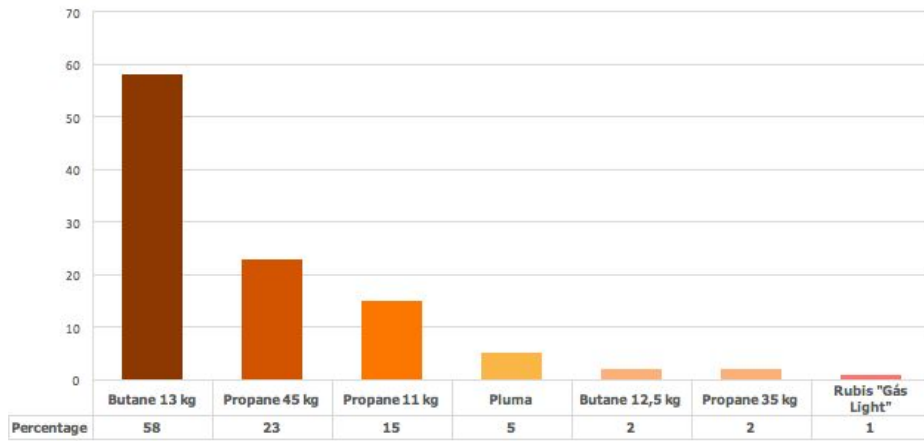
The Propane liquid phase bottle is **specifically meant for small or medium forklifts**.

Butane gas bottles are, by far, the most used by portuguese consumers, mainly in two different equipments: water heater and stove.

## Internal Analysis - Galp's Resources (1/3)

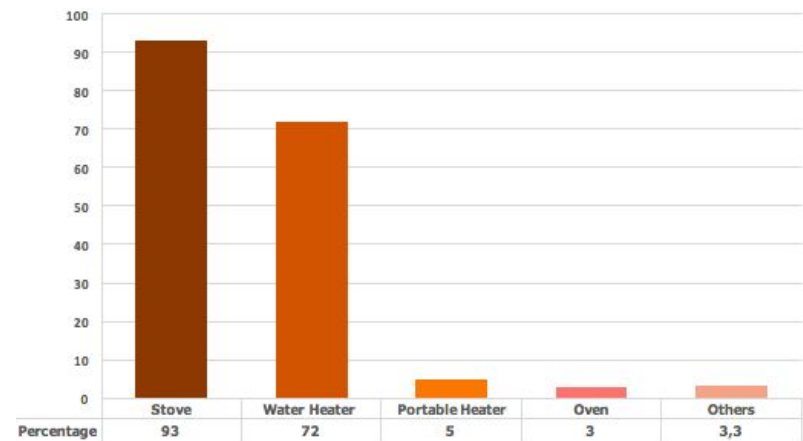
### LPG Bottled Tracking<sup>8</sup>

BOTTLE TYPE USED



The butane 13kg bottle is the **most used**, among the portuguese consumers, followed by the propane 45kg.

EQUIPMENTS WHERE THE GAS IS USED

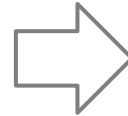
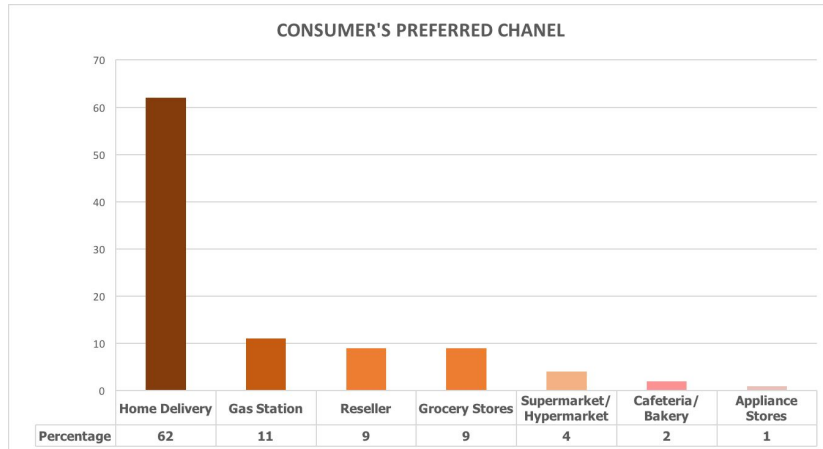


The stove and water heater remain predominant as the **most utilized** gas bottle **equipments**.

The LPG bottled clients are generally satisfied with the delivery service, which represents their preferred purchase channel. The categories with better evaluation are the confidence in the distributor and the delivery time.

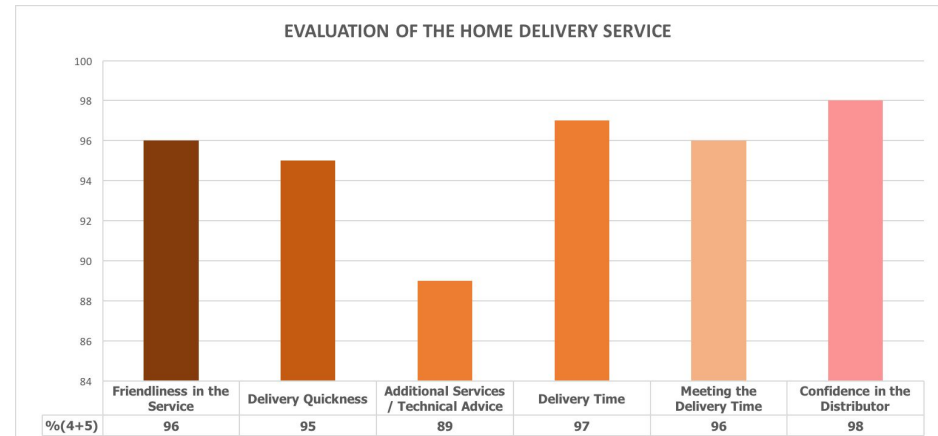
## Internal Analysis - Galp's Resources (2/3)

### LPG Bottled Tracking<sup>8</sup>



**Home delivery is the preferred channel** for buying bottled gas, followed by the gas stations.

Bottled gas customers are **generally very satisfied with the delivery service**. The parameter of confidence in the distributor stands out with an evaluation of 98%.



Galp is permanently focused on delivering higher value and quality to its clients, developing initiatives such as the “GasOnline” Portal, fully designed for them, and the “Programa Estrela”, created to improve the service provided.

## Internal Analysis - Galp's Resources (3/3) - Customer-Oriented Initiatives

### “GasOnline” Portal<sup>34</sup>

“**GasOnline**” Portal is Galp's **answer to the increasing demand for home delivery service**. The platform allows customers to **order gas online**, with a 24-hour window before the delivery time.

To place the order, the client has to create an account, indicating his tax number, name, email, phone number and address. Therefore, when the order is made, it will be automatically **directed to the reseller of each area**. The portal **enables Galp to gather relevant data about its clients**, since, before, that information belonged predominantly to the resellers.

The portal is still very recent, having been carried out a pilot in 2017, in Madeira. It will be only **advertised and launched to the general public in January of 2018**.

### “Programa Estrela<sup>9</sup>”

“**Programa Estrela**” is a Galp's quality control program, targeted to its first line resellers. It actively contributes to the standardization and sustained improvement of the service provided to the customers, ensuring legal and internal security parameters.

This contribution will be reflected in the **degree of customers' loyalty** to Galp Gas Resale Network.

In order to ensure the service quality, a **biannual performance evaluation** is carried out. This evaluation includes four parameters: reseller's audit (40%), points of sale's audit (10%), survey to the store / points of sale's clients (20%) and survey to home delivery clients (30%).

In the end, the results are published in a newsletter, sent to the **resellers**, and those **with better evaluation are awarded**.



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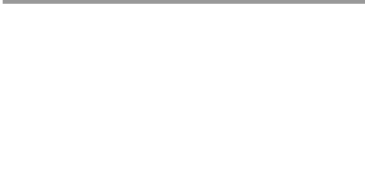
**4. External Analysis**

5. Research

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- 
- 4.1. Market
  - 4.2. Industry Trends
  - 4.3. Players in the National Market
  - 4.4. International Benchmark

The continuous increase in the price of the gas bottles and cylinders, together with the non-regulated prices, has been generating customer contestation, which results in legal and political pressures.

## External Analysis - Market (1/2)

### Legal/Political

Since 1990, the **LPG market is subjected to a free price mechanism**. This means that the producers, resellers and retailers are free to set their own prices for bottled gas (butane or propane).<sup>10</sup> This system is particularly controversial, especially due to the **elevated price of the gas bottles**. There has been some discussion about the possibility of price capping in this market, which would permit to control the abuses of the distributors.<sup>11</sup> It has also been discussed, as an alternative, the **creation of a social tariff, favorable for people with low incomes**.<sup>12</sup>

Regarding the product, both the **butane and propane gas bottle satisfy technical rules**, that impose the homogeneity of the product sold to the final consumer.<sup>13</sup>

More recently (March 2016), a **regulation that fosters the mobility between brands** entered into force, influencing the competition between them. This law allows the final consumers to freely switch bottles, from any brand, with the same quantity of gas.<sup>14</sup>

### Economic

Since 2014, there has been a **gradual decrease in the importing costs** of butane and propane gas.<sup>15</sup> However, this is not reflected in the price of the gas bottles, which has been increasing.<sup>16</sup>

Currently, the costs of LPG bottled represent €310 million more in the annual expenses of 2.6 million portuguese families, when compared to the ones who use natural gas.<sup>17</sup>

The butane and propane **bottled prices are influenced by the quotation of the petroleum products**.<sup>15</sup>

The demand for gas bottles is still considerable, however, future challenges, such as natural gas networks dissemination, might cause some variations, which can be softened through technological innovations.

## External Analysis - Market (2/2)

### Demographic (Social)

In 2014, according to the World Urbanization Prospects, **63% of the portuguese population lives in cities.**<sup>20</sup>

Furthermore, in 2050, it is estimated that Portugal will be the 32<sup>nd</sup> country with the biggest **decline of the rural population**, with a change of (42.1) %, comparing to 2014 (Rural migration).<sup>20</sup>

### Technological Developments

In relation to the most important developments in this market, the **reinforcement of the home delivery channel** can be highlighted, with the **creation of apps** and **portals** for the delivery of the gas bottle.

There has been also an investment in the **simplification of the product and process**. As such, it was developed a “transparent” bottle that allows the consumer to check the gas level, and that is lighter and safer than the other bottles in the market. Regarding the streamlining of the process, “Supergasbras” created the “Superbotão” device that places the order by just being squeezed by the client at home or wherever he has wi-fi.

### Consumption Patterns

The **bottled gas** is still the **main energy resource in Portugal for cooking and heating purposes**, even though the consumption of natural gas increased over the last years. According to *INE*, in 2010, from the **households** that used LPG in Portugal, **70% consumed LPG bottled** (over 2,6 million households).<sup>15</sup> However, consumers show dissatisfaction about the continuous price increases.

The demand for LPG bottled is **affected by seasonal factors**, with a consumption increase during winter, but also by **structural factors**, such as the gradual expansion of the natural gas distribution networks and the advantage of the natural gas price when compared to LPG bottled.<sup>15</sup> Currently, only 1.3 million portuguese households have access to the natural gas network, being more concentrated in large urban centers.<sup>21</sup>

Nowadays, companies must be aware of the industry trends and consumer behaviors that will sooner or later affect its business, so they can remain aligned with the customers' expectations and avoid being surpassed by competitors.

## External Analysis - Industry Trends<sup>22</sup>

1

**"Seamless" shopping experience:** The client looks for a store experience that is fast, fluid, effective and linked to the technology.

2

**Intellectual and interactive buying experience:** Customer centricity and a personalized service with memorable customer experience.

3

**The same business but better:** Demand for quality instead of quantity will change the consumer trends.

4

**Convenience:** A convenient shopping experience determines the client's choice.

5

**"Always on":** More and more, the new generation lives in a virtual world and companies can take advantage of this reality.

6

**Big Data:** Data analysis to allow real-time monitoring and business intelligence.

7

**Client empowerment:** The consumer, as the brand's co-creator, has influence on the product development.

8

**Customized offer:** The consumer is increasingly interested in having exclusive and tailor-made products.

9

**Sharing economies:** The consumers are more likely to share a product instead of buying it.

10

**Social and ecologic responsibility:** Impacting factors on the consumer buying decision process.

11

**Healthy living:** Consumers are worried about their personal life and aware of the damaging effects of a bad nutrition, addictions and sedentarism.

12

**New mobility and energy ways:** Appearance of new ways of mobility, either in vehicles or fuels.

The understanding of the current dynamics of the national market enables the comprehension of Galp's current position and positioning compared with the other existing players.

## External Analysis - Players in the National Market<sup>[5]</sup>

### Market Dynamics<sup>15</sup>

In the LPG bottled market, there **are four main players producing butane**: Galp, Repsol, Rubis (previously BP) and OZ (previously Esso). Regarding the propane production, beyond these four main players, there is also a new entrant in the market, **since 2013, named Prio**. More recently, during 2017, **a new player, named Cepsa**, entered the market of propane and butane bottled gas. The small number of players in the LPG bottled market, with very stable market shares over time, suggests a non-existent competitive dynamic among them.

According to the data, from 2015, analysed by AdC (*Autoridade da Concorrência*), **Galp is the market leader in the LPG bottled industry**, with roughly 40% market share in the propane bottled market and with over 40% in the butane. However, **Galp's market share in the propane bottled industry has been decreasing over the last 25 years**.

**All of the** abovementioned **players provide home delivery service**, since it is the distribution channel **more valued by the clients**. These are becoming more demanding, which forces the companies to provide **a fast and high quality service**.

Currently, **Galp's differentiating factor is its wide distribution network**, all over the country.

Regarding the competitors, Repsol's differentiating factor is its online platform and unique bottle k6; for Rubis, the particular butane bottle (Rubis Light), with an innovative design and new features that allow to control the gas level; for OZ, its quality delivery service; for Prio, its low prices and mobile application to order the bottles; and finally, for Cepsa, its cheaper and lighter bottle (X-Light).

<sup>[5]</sup>Detailed information on this topic can be found in appendix 3.1.

An important part of the external analysis consists in the international players research, to discover and identify best practices and where the innovation path is leading to, bearing in mind the different dynamics of each specific market.

## External Analysis - International Benchmark<sup>[6]</sup> (1/2)

### Butagaz, France<sup>24</sup>

**Butagaz is a french company** that supplies LPG for final consumers and businesses. The company is **one of the country leaders, regarding the propane and butane markets**. Butagaz has high levels of brand recognition and its main goal is to ensure the daily comfort of its nearly four million LPG bottled customers.

#### Differentiating Factor

Butagaz **variety of purchase channels is very distinctive**, providing **innovation and convenience** for its customer base. Besides having 17.000 stores in France, the company offers three more alternatives for gas purchase. The first one consists in **vending machines**, located in specific areas, with payment included. Secondly, the **Drive Butagaz app**, raised from a partnership with a supermarket chain, for the customers to collect the bottle together with the groceries, in the designated pick up point. Finally, the **Click and Collect App** enables the client to locate the nearest bottle dispenser, lock the desired bottle after paying it, and collect it within 48h.

### Flogas, U.K.<sup>25</sup>

**Flogas is a leading LPG supplier in the United Kingdom, with 30 years of experience**, and operates in Britain, Northern Ireland, Republic of Ireland, Belgium, Sweden, Norway and the Netherlands. Flogas provides energy solutions for two segments: homeowners and businesses, offering bulk LPG supply, metered estates and LPG cylinders and bottles.

#### Differentiating Factor

Flogas website and, particularly, its **client oriented platform represents a best-practice**. The website features online ordering and purchase, 24/7 emergency contact possibility, tutorials such as "Act Quickly" in case of gas problems and a link to an assistance online platform - Cadent. The website's section, **"My Account" platform**, offers a diverse range of services, for instance, order placements, payment, monitor usage and accounts activity track. It also enables the client to adhere to direct debit, e-billing (with reduced costs) and to opt for a fixed or variable pricing contract.

<sup>[6]</sup>Detailed information on this topic can be found in appendix 3.2.

An important part of the external analysis consists in the international players research, to discover and identify best practices and where the innovation path is leading to, bearing in mind the different dynamics of each specific market.

## External Analysis - International Benchmark<sup>[6]</sup> (2/2)

### Ultragas, Brazil<sup>27</sup>

Founded in 1934, **Ultragas is one of the most important Brazilian's LPG bottled providers.** Its customer base counts 11 million houses which, alongside the 50.000 business clients, consume approximately 1.7 million gas tons per year (23% of the total LPG consumed in the country).

#### Differentiation Factor

The **mobile application, provided by Ultragas**, excels for its **clarity, efficiency and range of features**, valued by the nowadays demanding and technologic-oriented client. Named **"Ultragas Connect"**<sup>28</sup>, the free app offers a fast process, starting with the address confirmation, bottle choice and preferred payment method. After the order, one is able to access a real-time vehicle tracking, following the delivery process, and to identify the distributor assigned to the service, as well as, evaluate him through the app.

### SupergasBras, Brazil<sup>26</sup>

**SupergasBras is a Brazilian company and one of the leading companies in the country's LPG market**, providing gas to nearly 10 million families. The company offers propane and butane in bottles, cylinders and static tanks. It has about 10.000 points of sale and commercializes roughly 130.000 tons of gas per month.

#### Differentiation Factor

Supergasbras disrupted the market with an **original way to order bottles through a device, that is requested online.**<sup>23</sup> The solution merges **innovation with extreme simplicity**, to facilitate the purchase to all-kind of customers. The order will automatically be done with a squeeze on the **"Superbotão" device**. The nearest distributor receives the notification and the client is able to follow-up the order status by checking the different colours displayed by the device (e.g. blue when the order is still under processing). The process is concluded when the bottle is delivered and the payment is done.

<sup>[6]</sup>Detailed information on this topic can be found in appendix 3.2.

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- 5.1. Data Collection Phase
- 5.2. Current Customer Journey
- 5.3. Relevant Customer Journeys
- 5.4. Personas
- 5.5. Pleasure Points List
- 5.6. Pain Points List



The data collection is executed in two distinct phases (observations and interviews). The regions are selected according to the sales relevance and performance in each region.

## Research - Data Collection Phase (1/2)

<sup>[7]</sup>Detailed information about resellers and distributors' insights can be found in appendices 4.1.1 and 4.1.2.

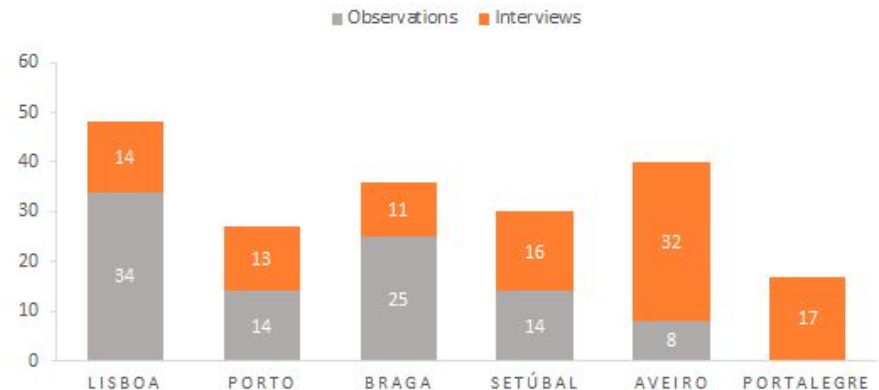
### Region Selection

Given the **national scope required for the project**, the team carefully selects the **geographical areas to collect information**, together with the Galp's LPG department.

The first **criterion** is the **sales volume**, to increase the probability of in-field observations. Then, from the ones with larger sales volumes, the team identifies regions with **both rural and non-rural zones**, to absorb different but complementary perspectives. The final step is done alongside Galp's sales representative of each area to establish **contact with the chosen resellers**.

Thus, **Lisboa, Porto, Braga, Setúbal, Aveiro and Portalegre** are selected, first for the in-field observations and then for the telephone interviews - each area reseller provides home-delivery clients contacts.

### DATA COLLECTION BY REGION



### Results<sup>[7]</sup>

The data collection phase culminates in **95 observations** and the qualitative research in **103 phone interviews**. During the observations, the actual customer journey is designed and the first insights, regarding pleasure and pain points, are found. Their relevance is later tested during the interviews, with the qualitative inputs from the clients.

The sample of clients is collected based on the region, without taking into account factors like gender or type of housing. However, these variables are important to characterize the clusters and better understand the results.

## Research - Data Collection Phase (2/2)

[8] Detailed information on this topic can be found in appendix 4.1.3.

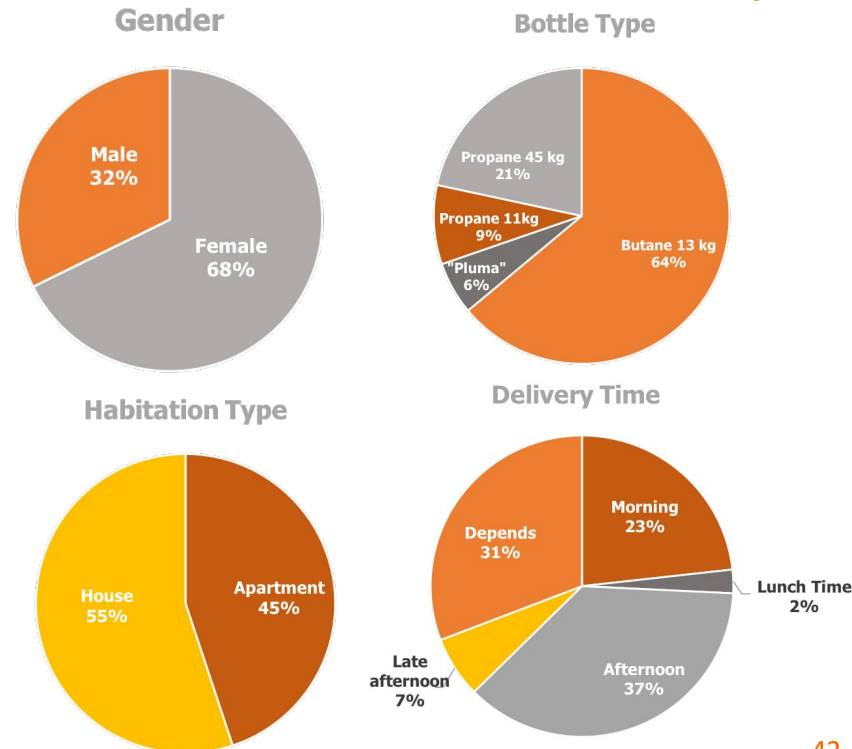
### Sample Description<sup>[8]</sup>

Regarding the sample, it is possible to conclude that almost **70% are females**, indicating a tendency for this gender to be a client of the home delivery service. However, there is still a considerable number of male consumers, with a percentage of 32%.

Furthermore, pursuant to the findings in the "Tracking GPL Garrafa", the type of bottle purchased by **more than half** of the sample was the **butane 13kg**, with a percentage of 64%, followed by the propane 45kg, with 21%, which makes sense given the impossibility to use the private vehicle to transport these type of bottle.

In the variable **type of housing** of the client, **there is not a significant difference**, with the houses and apartments representing 55% and 45% of the sample, respectively.

Regarding the delivery time, the majority of the customers requested the delivery for the (late) afternoon, with a percentage of 44%. It is also important to mention that **31% of the sample does not have a exact preferred period for the delivery**, depending on the time that the gas ends.



The Customer Journey is composed by six phases: order, wait, delivery, installation, payment and post-purchase.

## Research - Current Customer Journey

### Order

Making the order is the **first step** for the LPG bottled gas customer, who choses **home-delivery service**. This can be accomplished in **two** different **ways**: directly **calling** the preferred reseller or through **on-site order**, in the usual point of sale.

### Wait

Once completed the order, the customer will **wait for its processing** by the reseller. The time the customer waits is, therefore, the second step of his journey and it can **range from 30 minutes to 1 or 2 days**, depending on the region.

### Delivery

Afterwards, the delivery takes place. This is the moment when the client **receives the requested bottle**. Regarding this stage, two distinct options can take place: the **customer can either be present or absent** when the bottle is delivered.

### Installation

The bottle's installation is offered by the resellers. Hence, if the **client asks** for the **installation**, it **takes place right after the delivery**. However, this service might not be requested - the **client might prefer to do it by himself**.

### Payment

Once the bottle is delivered, the payment moment steps in. It can be completed using **cash, the most common method**, or **debit card**. Depending on the reseller, there is also the bank transfer payment option.

### Post Purchase

The post purchase is the last stage of the customer journey. It includes the **impressions the client has** regarding the product's usage, which **will influence his future decisions**.

In a total of thirty-two different customer journeys<sup>[9]</sup>, derived from the data analysis, only five are relevant in percentage terms, reflecting the journeys experienced by a higher number of clients.

## Research - Relevant Customer Journeys (CJ)

<sup>[9]</sup>Detailed information on this topic can be found in appendix 4.2.

CJ	Name	Order	Delivery	Installation	Payment	Weight (%)
1	Standard Client	Phone call	Present	No	Cash	36,93%
2	Installation Client	Phone call	Present	Yes	Cash	19,71%
3	Card Client	Phone call	Present	No	Card	12,41%
4	On-site Client	On-site	Present	No	Cash	7,69%
5	Absent Client	Phone call	Absent	No	Cash	7,40%

- The selection of **relevant customer journeys** is made according to its **statistical weight**. The customer journeys with representivity **higher than 7%** are, therefore, considered.
- From the five selected, there are **four customer journeys** where the order is made by **phone call** and, other four, where the **client is present** during the delivery moment. Moreover, the **payment by card** and the **installation of the bottle** by the distributor, after the delivery phase, are reflected in just **one customer journey**.

The personas represent different types of customers, with distinct characteristics and preferences. Those differences depend on variables such as the housing type, period of delivery and the type of bottle.

## Research - Personas (1/7)

CJ	Name	Age	Region	Housing Type	Period of Delivery	Type of Bottle	Payment
1	Maria Dias	65	LVT	Apartment	Morning	Butane 13kg	Cash
1	Luísa Baptista	54	North	Apartment	Late Afternoon	“Pluma”	Cash
2	José Silva	70	North/Center	House	Undefined	Propane 45kg	Cash
3	Adelaide Ferreira	65	Undefined	Apartment	Morning	Butane 13kg	Card
4	Ricardo Adão	52	LVT	Apartment	Morning	Butane 13kg	Cash/Bank Transfer
5	Paula Matias	44	Center	Apartment	Undefined	Butane 13kg	Cash/Card

In each **customer journey**, it is identified a **specific group of clients (personas)**, who represent it. These personas have **different characteristics and preferences**. Those consist on their **age, living region, housing type, the preferred period for delivery, the type of bottle purchased** and the most common **payment method** used.

The customer journey 1, particularly, has two personas, mainly due to the different age, region and type of bottle ordered.

Maria is inserted in the *CJ* 1 (36,93% of the sample), representing the clients who order the bottle by **phone**, are **present** to receive it, **do not** request the bottle's **installation** and pay in **cash**.

## Research - Personas (2/7) - Standard Client

### Maria Dias



#### Data

**Age:** 65

**Region:** LVT

#### Story

Maria lives in an apartment and orders the butane 13kg bottle by phone. She prefers not to have a reserve bottle due to space and budgetary issues. During the morning, she is always at home so she schedules the delivery for that period, whether it is during the week or the weekend. She always pays in cash and the bottle's installation is made by her or her husband.

#### Pleasure

"Once, the bottle ended on Sunday and they delivered it without any problem."

"Galp is the fastest to deliver, when I order they come right away."

"I can not go get them, I am already an elderly person and I am grateful that they bring it to me."

#### Pain

"The bottles are too heavy and I do not have enough strength to carry them."

"The home delivery service is a little bit expensive."

"The indicated time period for the delivery service is too long. They never say the exact time, I can either wait 5 minutes or 4 hours."

"It is a bummer to have the bottles taking space in the marquise."

"When the bottle is full it has little power, so I have a hard time turning on the stove at first."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase

Luísa is inserted in the C1 1 (36,93% of the sample), representing the clients that order the bottle by **phone**, are **present** to receive it, **do not** request the bottle's **installation** and pay in **cash**.

## Research - Personas (3/7) - "Pluma" Client

### Luísa Baptista



#### Data

**Age:** 54

**Region:**

North

#### Story

Luísa lives in an apartment, is client of "Pluma" and orders it by phone. She likes to have a reserve bottle and prefers to schedule the delivery for the late afternoon, when she arrives from work. She is not very demanding with the delivery speed and she feels comfortable enough to install the bottle alone. She pays in cash and, occasionally, she gives a tip to the distributor.

#### Pleasure

"I do not have transport means, so it pleases me to ask them to bring it home."

"Even if I pay 1 € more, I prefer it, I do not have time to go and pick the gas bottle."

#### Pain

"The men are a little grumpy, it is typical of the portuguese people."

"I already had accessories that broke down before the expiration date due to bad quality of the material that the reseller received from the supplier."

"I do not like having gas bottles inside my house. I am scared, it is very dangerous."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase

José is inserted in the *CJ* 2 (19,71% of the sample), representing the clients that order the bottle by **phone**, are **present** to receive it, **request** the bottle's **installation** and pay with **cash**.

## Research - Personas (4/7) - Installation Client

### José Silva



#### Data

**Age:** 70

**Region:**

North/Centre

#### Story

José lives in a house and requests his propane 45kg bottle by phone, being willing to wait for the delivery, since it has a reserve one. He is at home during the delivery, which sometimes takes place during the weekend, paying right away in cash. He trusts completely in the distributor and in his recommendations.

#### Pleasure

"They always have bottles available in the truck and they bring it on the time. I even ordered one on Christmas Day."

"As it is a 45kg bottle, it is impossible to bring it by car. So I avoid that concern!"

"He makes recommendations about the installation and changes the tubes when needed."

"When they leave the bottle, they always check if everything is in order, especially the validity of the piping."

"It has no disadvantages. I do not pay for the service."

"The bottles I used before looked like they came empty and the ones from Galp last a lot longer."

#### Pain

"The price is very high, it takes a large amount per month."  
"Compared with Spain, the price is the double. They always say it is going to decrease but it is getting more expensive."

"It is annoying not knowing when the gas is going to end."  
"The bottles are very old and have rust."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase



Adelaide is inserted in the *CJ* 3 (12,48% da amostra), representing the clients that order the bottle by **phone**, are **present** to receive it, **do not** request the bottle's **installation** and pay with **card**.

## Research - Personas (5/7) - Card Client

### Adelaide Ferreira



#### Data

**Age:** 65

**Region:**

Undefined

#### Story

Adelaide asks for her butane bottle by phone and makes a point of having one as reserve, so she is not surprised. She does not like to wait more than 24 hours for the deliver. Adelaide is always at home during the morning, until lunch time, to receive the bottle. She prefers to pay right away with her bank card and, due to the distributor's friendliness, she normally gives a tip.

#### Pleasure

"They bring it to the house and I avoid going to pick it up. Do you imagine the inconvenience of having to carry the bottle?"

"The people are friendly and attentive."

"Look, I have been buying it there for almost 50 years, it is like family."

#### Pain

"I wish the delivery was available 24 hours a day and 7 days a week."

"Once in a while, I spend some time waiting for them, but we have to be reasonable, they have a lot of orders."

"It seemed like I had to be subjected to them, when they were available I was not."

"I always have to ask to check the tubes' validity and to exchange them."

"I would like to have piped gas, it is more comfortable."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase

Ricardo is inserted in the *CJ* 4 (7,69% da amostra), representing the clients that make the order for the bottle **on-site**, are **present** to receive it, **do not** request the bottle's **installation** and pay in **cash**.

## Research - Personas (6/7) - On-Site Client

### Ricardo Adão



#### Data

**Age:** 52

**Region:** LVT

#### Story

Ricardo has the habit of visiting the store to order the butane 13kg bottle, and asks for the deliver to be done in the morning, when he is still at home. He makes the payment when he places the order, in cash, using occasionally bank transfer. He has no spare bottle and prefers to install the bottle himself.

#### Pleasure

"I once had to pay by bank transfer and there was no problem."

#### Pain

"It would be better if I could make the order online."

"Today comes one, tomorrow comes another, I do not have much confidence with them."  
"There is no advantage, it is circumstance. The home delivery service is like leaving the door open for everyone."

"Nothing assures me that the bottle has not yet been used, having the sealant does not convey sufficient confidence."

Stages



Order



Wait



Delivery



Payment



Post-Purchase

Paula is inserted in the *CJ 5* ( 7,40% of the sample), representing the clients that order the bottle by **phone**, are **absent** during the delivery, **do not** request the bottle's **installation** and pay in **cash**.

## Research - Personas (7/7) - Absent Client

### Paula Matias



#### Data

**Age:** 44

**Region:**

Centre

#### Story

Paula prefers to order the bottle by phone, but sometimes she goes to the store. She buys butane 13kg and chooses not to have one as reserve, since she has always two bottles in use. She is flexible with the delivery, since she is not usually present to receive the bottle. She pays in cash, before or after the delivery, but sometimes pays with credit card or bank transfer.

#### Pleasure

"I do not have to be at home to receive it."

"I like it because they deliver it at home and I do not have to worry about picking it up."

"The distributor is already part of the furniture."

#### Pain

"I order over the weekend, but they only deliver it on Monday."

"I would like if there was more prior information about the price increases ."

"Once, I wanted to pay with card and they did not have the ATM terminal available."

"The last one I received had a degrading aspect."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase

91% of the clients in the sample mentioned pleasure points, indicating that in general the consumers are satisfied with the process.

## Research - Pleasure Points List<sup>[10]</sup>

Order	Wait	Delivery	Installation	Payment	Post-Purchase
<p>Transport of 45 kg bottles (13,91%)</p> <p>Flexible delivery times (6,39%)</p> <p>Reliable service (1,13%)</p> <p>24/7 availability (0,75%)</p>	<p>Quick delivery service (7,52%)</p>	<p>Convenience (20,68%)</p> <p>Comfort (16,17%)</p> <p>Delivery to clients without means of transport (5,26%)</p> <p>Distributor's sympathy (4,89%)</p> <p>Time-saving (4,14%)</p>	<p>Accessories condition monitoring (2,26%)</p> <p>Bottle's installation (1,88%)</p> <p>Accessories' substitution (1,88%)</p>	<p>Free delivery (2,63%)</p> <p>Payment flexibility (0,75%)</p>	<p>Good relationship with the reseller (6,77%)</p> <p>New bottles (1,13%)</p> <p>Clean bottles (1,13%)</p> <p>Gas durability (0,75%)</p>

<sup>[10]</sup> Detailed information on this topic can be found in appendix 4.3.

Regarding the pain points, they were mentioned by 58% of the sample, suggesting that there are still some improvements to be made in the home delivery service.

## Research - Pain Points List<sup>[10]</sup>

Order	Wait	Delivery	Installation	Payment	Post-Purchase
Lack of weekend delivery (11,11%)		Lack of trust with the distributors (5,05%)			Lack of power, poor state, and space occupied by bottles (8,08%)
Reduced delivery periods (7,07%)	Long waiting times (7,07%)	Insecurity with the reception of distributors at home (2,02%)	Insufficient verification of the accessories' validity (8,08%)	High prices (19,19%)	Unpredictability of the end of the gas bottle (4,04%)
Bottle's weight (7,07%)	Uncertainty of the exact delivery time (2,02%)	Limited delivery flexibility (2,02%)	Installation of non-durable accessories (1,01%)	ATM unavailable (2,02%)	Lack of piped gas in the residence zone (3,03%)
Cost of delivery service (2,02%)		Lack of sympathy of the distributors (1,01%)		Lack of information about price increases (1,01%)	Fear of having gas bottles at home (2,02%)

<sup>[10]</sup>Detailed information on this topic can be found in appendix 4.3.

1. Theoretical Background

2. Methodology

3. Internal Analysis

4. External Analysis

5. Research

**6. Recommendations**

7. Limitations

8. References

6.1. Price, Product and Delivery

6.2. Categories

6.2.1. Process

6.2.2. "GasOnline" Portal

6.2.3. "Programa Estrela"

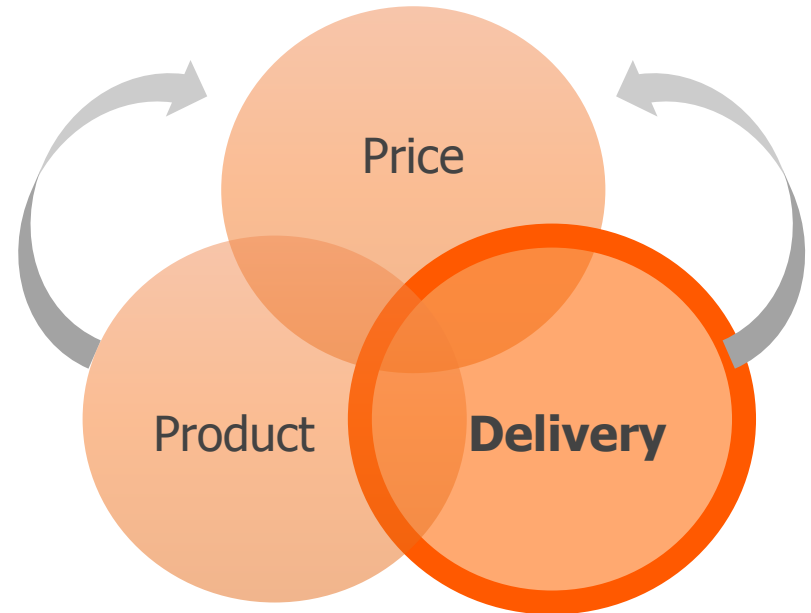
Regarding the three main aspects one can modify in order to improve the client's experience, the delivery is the one that would contribute more effectively to it.

## Recommendations - Price, Product and Delivery

To **improve the customer base experience**, Galp should implement a diverse set of changes. Those adjustments will always be part of one of the three main categories: **Price, Product or Delivery**.

- **Changes in prices** (decreases) automatically satisfy the clients, however, they do not contribute to the relationship between the company and the customer. Moreover, it would not be aligned with Galp's interests.
- **The Product development** or innovation is required to guarantee continuous satisfaction and to meet the clients increasingly demanding needs.
- **The Delivery** consists in the service component, in this specific market, and the interaction moment between the client and the company.

Galp aims to **build a long-lasting relationship with its customers**, by understanding them at all levels, and to meet their requirements. Therefore, **the delivery component is the most impactful** and the one enabling higher levels of **differentiation**, fostering the retention of the existing clients and attraction of new ones.



To positively influence the delivery service, precise actions should be implemented, individually contributing to a common strategy. Those were categorized in three distinct impact spheres (Process, “Programa Estrela” and “GasOnline” Portal).

## Recommendations - Categories

### Process

The process improvement **aims to directly address specific pain points identified**. By interpreting the customer journey, step by step, it is possible to point out the **potential changes (quick wins or challenges) the company should implement** to enhance the client's experience. An example would be to adjust the process, enabling larger service schedules for home-delivery or even to create a customer service manual for the distributors, to boost the service quality.

### “Programa Estrela”

“Programa Estrela” is an internal quality program that intends to consistently improve the service provided to the clients by the first line resellers. A determined set of parameters, including safety, legal, communication and service excellence, are assessed and the higher ranked resellers receive monetary compensations. Thus, **changes in the program's structure will indirectly influence the customer experience**.

### “GasOnline” Portal

**The online portal will be soon launched**, after an experimental period performed in Madeira. The first version will, undoubtedly, be improved in the near future, however, the team was asked to specify a group of **recommendations to boost the online portal usage and user-friendliness**. The suggestions are divided based on the implementation time: short, medium and long term.



The additional services' availability, such as technical assistance for the equipments, would change the perception of the extra cost of the service. In addition, the creation of a platform with wheels would facilitate the bottles' mobility, leading to the mitigation of the bottle's weight pain point.

## Recommendations - Process<sup>[11]</sup> (1/8)

<sup>[11]</sup>Detailed information on this topic can be found in appendix 5.1.

Order



Wait



Delivery



Installation



Payment



Post-Purchase

Pain Point	Quick Win	Challenge
<p>"The home delivery service is a little bit expensive."</p>	<p><b>Complement the home delivery service with additional services</b>, such as equipment and bottles' technical assistance, with associated communication campaigns.</p> <p>Foster and <b>promote</b> the <b>advantages</b> of the <b>home delivery service</b>, justifying the extra cost.</p> <p>Occasional campaigns with <b>delivery free of charge</b>.</p>	
<p>"The bottles are too heavy and I do not have enough strength to carry them."</p>	<p>Provide a <b>wheeled platform</b> to facilitate the bottle's mobility at home.</p> <p>Tutorial: <b>"How to properly transport the bottles?"</b>.</p>	<p><b>LPG bottle filling system at clients' home</b> - particularly for houses and collective apartments (difficult to implement due to the portuguese legal constraints). Ex: Elgas in Australia</p> <p><b>New bottles</b> made of <b>lighter material</b>, such as stainless steel and iron alloys.</p>

The delivery time is an important factor for clients' retention. Thus, its extension and the "piquetes" hiring, to answer the orders made during the weekend, will enhance the client's experience.

## Recommendations - Process<sup>[11]</sup> (2/8)

<sup>[11]</sup>Detailed information on this topic can be found in appendix 5.1.

Order ► Wait ► Delivery ► Installation ► Payment ► Post-Purchase

Pain Point	Quick Win	Challenge
<p>"I wish the delivery was available 24 hours a day and 7 days a week."</p> <p>"I order over the weekend but they only deliver it on Monday."</p>	<p>Extend the <b>working hours</b> (8h-22h).</p> <p>Hire part-time <b>"piquetes"</b> available to deliver during the <b>weekend</b>.</p> <p>Communicate the <b>delivery service outside of the normal working</b> hours as offered with an <b>extra cost</b>, known as the service fee.</p> <p>Promote the <b>advantage of ordering during the week</b> - cheaper and faster.</p>	<p>Define <b>time periods</b> with <b>more requests</b> and <b>adapt the delivery time</b> and the <b>number of employees</b>.</p> <p><b>Predict the end of the clients' gas</b>, according to their <b>usage history</b>, and <b>notify</b> them by <b>email or phone message</b>.</p>

The development of a mobile application will allow the client to order the bottle and to follow the real-time tracking of the distribution car, increasing the delivery accuracy and managing the clients' expectations.

## Recommendations - Process<sup>[11]</sup> (3/8)

<sup>[11]</sup>Detailed information on this topic can be found in appendix 5.1.



Pain Point	Quick Win	Challenge
"The indicated time period for the delivery service is too long. They never say the exact time, I can wait either 5 minutes or 4 hours."	Option to set the <b>delivery time</b> for the <b>same day and hour every month</b> .	<p>"<b>LPG Bottled's Uber</b>": app that allows the client to order his LPG bottle, with real-time tracking of the distribution vehicle and the time left for the delivery to be concluded.</p> <p>Option for the <b>client</b> to send an <b>SMS</b> with his client's number and receive the estimated <b>time</b> left for his order to be <b>delivered</b>.</p>
"Once in a while, I spend some time waiting for them, but we have to be reasonable, they have a lot of orders."	<p>The client is informed, in advance, of the predicted waiting time and <b>receives a discount or gift</b> if it delays more than <b>1 hour</b>.</p> <p>Option for the <b>client</b> to <b>write on the portal</b> the <b>exact hour of the delivery</b>.</p> <p><b>Split the distributors</b> into two groups, one for orders made in <b>advance</b> and the other for the <b>urgent</b> ones, during peak hours.</p> <p><b>Bottle discount</b> if the delivery delays more than <b>one day</b>.</p>	<p>Improve the delivery logistic - <b>predict the end of the gas of each consumer</b>.</p> <p><b>Order</b> goes automatically for the <b>nearest distribution car (GPS car track)</b>.</p> <p>Information on the <b>portal</b> of the <b>time</b> remaining for the <b>distributor to arrive</b>.</p>

The creation of the clients' profile on the portal with the consumption history and preferences, introducing simultaneously, a bonus' system to award the distributors for their sympathy will help to respond to the needs of every client.

## Recommendations - Process<sup>[11]</sup> (4/8)

<sup>[10]</sup>Detailed information on this topic can be found in appendix 5.1.

Order



Wait



**Delivery**



Installation



Payment



Post-Purchase

Pain Point	Quick Win	Challenge
"It seemed like I had to be subjected to them, when they were available I was not."	<p>Creation of the <b>clients' profiles</b> with their <b>delivery preferences</b>, for better distributors' management.</p> <p><b>Hire part time distributors</b> for the busiest periods (beginning and end of the day), particularly during the winter.</p> <p>Campaigns for clients to <b>schedule the delivery in advance</b>.</p>	
"The men are a little grumpy, it is typical of the portuguese people."	<p>Create <b>bonus</b> for the <b>distributors</b> with the <b>best rating scores</b> or the ones referred as the most friendly on the portal.</p> <p><b>Customer review of the distributors</b> on the portal.</p> <p>Occasional <b>monitoring of the distributor by the reseller</b>, during the delivery act, to evaluate the practices <i>in loco</i>.</p> <p>Periodic <b>meetings with the distributors</b> to give <b>feedback</b> about their performance on the delivery service and propose improvements.</p>	

The development of a manual for the distributors with customer service standards, the distributors' choice by the client and the reformulation of the uniforms will contribute to the standardization of the clients' approach.

## Recommendations - Process<sup>[11]</sup> (5/8)

<sup>[11]</sup>Detailed information on this topic can be found in appendix 5.1.

Order



Wait



**Delivery**



Installation



Payment



Post-Purchase

Pain Point	Quick Win	Challenge
"Today comes one, tomorrow comes another, I do not have much confidence with them."	<p>Add <b>each distributor's profile</b> to the portal, with the correspondent information - picture and name.</p> <p><b>Distributor's self presentation to the client</b>, when he delivers for the first time, providing a brief explanation on the reason behind the distributor's change.</p> <p>Allocate <b>areas/clients</b> by <b>distributor</b> to assure always the same.</p>	Option for the <b>clients</b> to <b>choose the distributor</b> on the portal or by phone (possible rerouting needed).
"There is no advantage, it is circumstance. The home delivery service is like leaving the door open for everyone."	<p>Develop a <b>manual for the distributors</b> with <b>customer service standards</b>, including the right approach to the clients in the delivery.</p> <p>Inform the client the <b>name of the distributor</b>, that will deliver his bottle, when the order is confirmed.</p> <p>Emphasize the <b>option</b> to deliver the bottle with the <b>absent client</b>.</p> <p>Add a <b>badge</b> with the name of the distributor to all the uniforms.</p>	<b>Reformulation of the uniforms</b> properly identified with Galp's brand.

The option to purchase the accessories, as an add-on to the bottle, automatically registering on the clients' profile the material's validity, is one of the actions that should be made in order to improve the portal. Furthermore, it will be possible to notify the client when the validity is about to end, through an email or phone message.

## Recommendations - Process<sup>[11]</sup> (6/8)

<sup>[11]</sup>Detailed information on this topic can be found in appendix 5.1.

Order



Wait



Delivery



Installation



Payment



Post-Purchase

Pain Point	Quick Win	Challenge
"I already had accessories that broke down before the expiration date..."	Option for the client to <b>exchange or get a refund in case of the accessories' malfunction</b> (up to one month after the delivery).	
"I always have to ask to check the accessories' validity and to change them."	<p><b>Personalized clients' profiles</b> on the "GasOnline" Portal with the <b>accessories' validity</b> and automatic reminders by email or phone message when the expiration is approaching.</p> <p><b>Annual phone calls</b> to remember and ask the clients about the accessories' validity and conditions.</p>	<p>Include the <b>accessories' purchase on the portal</b> (add-on with the bottles) and validity's registration on clients' profile.</p> <p><b>Clients' booklet</b> with individual dates of the accessories' validity verifications.</p>
"Once, I wanted to pay with card and they did not have the ATM terminal available."	<p>Provide an <b>ATM terminal</b> in all the distribution trucks.</p> <p>Always <b>ask the payment method</b> which will be used by the client, and <b>communicate it to the distributors</b>.</p> <p>Allow the <b>payment by bank transfer</b> when there is no ATM terminal available (depending on the geographical area).</p>	

To transmit more safety to the clients it is important to refer the existence of free insurance and to create tutorials demonstrating how to check if there is a gas leak and how to act during it.

## Recommendations - Process<sup>[11]</sup> (7/8)

<sup>[11]</sup>Detailed information on this topic can be found in appendix 5.1.

Order ► Wait ► Delivery ► Installation ► Payment ► **Post-Purchase**

Pain Point	Quick Win	Challenge
"I do not like having gas bottles inside my house, I am scared, it is very dangerous."	<p><b>Safety Tutorials</b></p> <p>Ex: "How to check if there is a gas leak and what to do during it?".</p> <p>Always refer the existence of <b>free insurance</b>.</p> <p>Add <b>insurance stamp on the receipt</b>, together with the already existing stamps of service quality.</p>	
"It is annoying not knowing when the gas is going to end."	<p>Invest in <b>reserve bottles' campaigns</b>.</p> <p>Call or <b>pass by clients' house regularly</b> to know if everything is ok with the equipments and to ask if they eventually need gas.</p>	<p>Analyse the <b>customers' consumption history</b> and <b>notify them</b>, one week in advance, by phone message or email, <b>when the gas is about to end</b>.</p> <p>Develop a <b>platform to transport the bottles</b> with a scale incorporated.</p> <p><b>Built-in chip</b> on the bottles that quantifies the current gas level and displays it on a screen.</p>

In order to solve the pain point of the bottles' poor condition, it is necessary to prioritize the ones in better conditions for houses. Moreover, it is essential to negotiate with CLC the intensification of the bottles' cleanup process.

## Recommendations<sup>[12]</sup> - Process<sup>[11]</sup> (8/8)

Order ► Wait ► Delivery ► Installation ► Payment ► **Post-Purchase**

Pain Point	Quick Win	Challenge
"The last one I received had a degrading aspect."	Previous selection of the <b>bottles</b> in <b>worst conditions</b> for <b>B2B</b> and priority of new bottles for houses.	<b>Negotiate with CLC</b> and Pergás the <b>intensification and improvement</b> of the <b>bottles' cleanup process</b> .
	Search <b>innovative products to clean the bottles</b> - contest with resellers and distributors with prizes.	Campaign with <b>plastic covers for the bottles</b> (initial offer) with the option to personalize later.
	The <b>distributor</b> should <b>wipe the bottle</b> with a soft dry cloth in <b>front of the client</b> , right before delivering it.	

<sup>[11]</sup>Detailed information on this topic can be found in appendix 5.1

<sup>[12]</sup>Detailed information about the ideal customer journeys can be found in appendix 5.2.



Although the “GasOnline” Portal is still in its early stage, it presents potential axes of improvement, that will enable it to more effectively respond to the needs of the clients in the future.

## Recommendations - “GasOnline” Portal

### Short Term (½ to 1 year)

- **Create a survey** to the clients adhering to the portal about their **preferences**, in order to get data about the **purpose of the bottle usage, purchase frequency, preferred delivery period**, etc.
- Add the **opening hours from each reseller** - not only the available slots for delivery.
- Add the option for **customer review of the distributors** to be shared on the online portal (not only of the resellers).
- Add the option to **schedule** the delivery for the **same day and time every month**.
- Create **clients’ profiles** with their **delivery preferences** for a better distributors’ management.
- Include the **purchase of accessories** - pressure regulator, “tubos de lira”, etc - only as an add-on to clients who order the bottles.

### Medium Term (1 to 2 years)

- Add each **distributor’s profile**, with the correspondent information - picture and name.
- Provide the option of **online payment** - yet **keeping the option to pay on the delivery act**.
- Add the option to **choose the distributor** who is going to deliver the order.
- Add the option for the clients to register their **accessories’ validity**, receiving **automatic reminders** by email or phone message when the **expiration is approaching**.

### Long Term (Up to or more than 3 years)

- Provide **up-to-the minute information** about the remaining time for the **distributor** to arrive (manage clients’ expectations).
- Ensure the **delivery** for at least **2 hours** after the order is made (currently it is 24h after).
- Analyse the **customers’ consumption history** and **notify** them one week in advance, by phone message or email, when the **gas is about to end**.

The recommendations targeted for the “Programa Estrela” are splitted in two groups: one regarding aspects to modify and other with features to add to the program.

## Recommendations - “Programa Estrela”

### To be modified

Review and **increase the weight of the home delivery service** evaluation and decrease the weight of points of sale.

Guarantee that the **interviewed** in the survey **is a frequent client from the evaluated reseller** (Asking the last number they used to order LPG bottled).

Adapt the evaluation (**differentiation**) according to the **number of points of sales** from each **reseller** (rankings, classes) .

Give **more emphasis to the evaluation of the services provided** by Galp stores (decrease the weights in the dimension “1.1. Image” and increase in the dimensions “1.2. Convenience” and “1.3. Services”).

### To be added

Evaluate if the **resellers register the accessories’ validity** of every client, in the dimension “1.3. Services”.

Evaluate the **bottles’ condition in the distribution trucks**, in the departure hours for delivery (9h or 14h/15h) on point 1.10.

Evaluate the **conditions** and uniformization of the **uniforms** of the **front-office staff and distributors** on the category 2.

Evaluate the **park conditions (licensing)** in the dimension “1.5. Legal Conformity”.

**Reward the resellers** according to the percentage of clients, from their geographical area, who **adhere to the online portal** (5%).

**Mystery client testing for the home delivery service**, in order to truly evaluate the distributors.

1. Theoretical Background
2. Methodology
3. Internal Analysis
4. External Analysis
5. Research
6. Recommendations
- 7. Limitations and Further Research**
8. References

The main limitations of the project consist on the size of the sample (small when compared with Galp's LPG bottled clients), the focus on the home-delivery clients, the period for data collection (mainly between 9am and 18pm) and the geographical coverage.

## Limitations and Further Research

### Sample

The **size of the sample**, gathered for the project, is **small** comparing to the **dimension of Galp's customer base**. The data collected from the 198 customers, in the observations and interviews phases, despite providing enough basis to develop the project, can be seen as insufficient for a deeper understanding of the problem. Furthermore, the sample was, due to time constraints and seasonality influences, **restricted to home-delivery clients** and, subsequently, the rest of the customers were not taken into account. Regarding the time constraint, the **period for data collection, during the usual working hours**, influenced the results. The sample was mainly composed by customers who were at home during the day - usually from 9am to 18pm.

### Moment

Given the time constraint and lack of direct access to the final consumer (dependent on the reseller), **only the purchase moment was studied**. To deepen this analysis, it would be important to understand the **reasoning behind the decision moment** - when the client decides to buy Galp's LPG bottled gas rather than other brand.

### Geography

Despite the national coverage of the project, **the southern region contributed less** than the regions above Lisbon. At least some district capitals, such as Faro and Évora, would add value to the team's findings. Moreover, the **region of Lisbon** would need a **more profound scrutiny** as it represents a **distinct and singular market**, with different dynamics regarding competition and much more demanding customers.

1. Theoretical Background
2. Methodology
3. Internal Analysis
4. External Analysis
5. Research
6. Recommendations
7. Limitations
- 8. References**

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# 1. Individual Reports

## 2. Methodology

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1.1. Main Apprenticeships

1.2. Belbin Results

# **1.Individual Reports**

This project was essential to develop my presentation and communication skills, and to learn the importance of syndication and focus in a project.

## Individual Reports - Alice Barros (1/2)

### Main Apprenticeships

Presentations Skills	Communication	Syndication	Focus
<p>Regarding my presentation skills, while I consider that the university has given me a vast experience in terms of presentations, it is certainly a different experience to have to present to a marketing director of a company like Galp, and to the people who have accompanied us during the project. The capabilities that I have acquired will undoubtedly be useful to me in the future.</p>	<p>Communication is an essential factor, especially in a group work. As part of a team, it is essential to communicate our opinions and points of view, however, knowing also to listen to what others have to say. Nonetheless, one should communicate not only with the team but also with the client, in order to ensure that both parties are in accordance. It is also essential to know how to communicate in an effective and attractive way the outputs to the client.</p>	<p>Syndication was a key factor in our project. By working alongside the Galp's team, we were offered constant support and guidance, and we were able to clarify any doubts we had during the project, which allowed us to obtain better results and to be always aligned with the company's objectives. Furthermore, during the recommendations phase, we were able to speak directly with the areas influenced by them and to obtain a validation of the actions on their part.</p>	<p>During the project, I learned that we can not lose the focus of our work. We must always be aware of what the client wants, since we are developing the project for him. In addition, our focus on the work and dedication proved to the client that we cared about the project and that we were devoted to doing a good job.</p>

By analyzing the Belbin's results, it is possible for me to get a better idea of the features I need to work on in the future and those that best suit my work style.

## Individual Reports - Alice Barros (2/2)

### Belbin Results

Prospector

Finisher

Monitor

President

Operational

Team Worker

It is also important to mention the points in which I need to work more to be able to improve them in the future. Firstly, I should try harder to not let my opinions and feelings interfere with the analytical results. Besides, I should try to give more feedback to the group, more precisely, in the beginning, when I am still not comfortable with the group and, as result, I interact and expose less my opinions. Concerning the finisher aspect, I actually consider myself a perfectionist person, who likes to keep the work uniform, paying attention to the smallest details. However, sometimes during the project, I tend to get distracted, which is something that I should try to avoid and work on more. Regarding the prospector, I strongly agree with the result since in the meetings, I usually tend to let the other members dominate the discussion, especially in the beginning of the project. That said, I need to work more on my ability to take the lead and to interact more in the meetings.

Analyzing the Belbin' results, it is possible to verify that the qualities that better fit my work style are teamwork, operational and president. First, in relation to the teamwork, I agree with the result because I consider myself a person that promotes unity in the group and that is an enthusiastic member. I am also a good listener, being ready to support the ideas, that I consider relevant, from my colleagues. However, I also communicate to the group when I don't agree with a point of view, being able to reach a consensus in an effective and productive way. Furthermore, I also agree with the operational result, as I am a stable and practical person that likes to keep the work organized and efficient. Regarding the president, it is true that I coordinate tasks, since I consider that it is more productive to divide assignments by the different group members, in some phases of the project. However, I still need to work on my communication skills, especially, when expressing my points of view.

This three month project was a truly enrichment experience since I worked daily and directly with a highly prestigious company and deeply learned about a completely new business product. Throughout this period, I developed skills such as syndication, presentation skills, team work and resilience.

## Individual Reports - Ana Carolina Costa (1/2)

### Main Apprenticeships

Syndication	Presentation Skills	Team Work	Resilience
At every step of the project, we had to make sure the people from the involved areas had their interests aligned with ours, managing this way their expectations concerning the final result. This challenged us to contact with different business areas for them to analyze and approve every stage of our project, allowing this way that all the areas were on the same page regarding our project's evolution. With this continuous direct contact and interaction with the client I become more aware of the huge importance of syndication.	During the project, we were subjected to weekly presentations to demonstrate our work week by week, this mean, the tasks performed in that period and the next steps to make until the following week. This presentations had also the objective of aligning our expectations with the ones from the client and make the desired modifications if we needed to. These periodic presentations allowed me to progressively improve my communication skills since the beginning of the project, given the practice and the feedback received.	The team work was crucial during this project. We had to adapt to each other's work methodologies, as well as to each one's behavior while working in group. It is really important to listen the other's ideas and opinions without judging them, discuss them all in group and combine the best of all the ideas, finding in the end a solution mutually agreed. The continuous communication within the group is also very important, particularly, when splitting tasks because everyone needs to be working towards the same goal.	Throughout the project, we faced some challenges regarding the initial scope of the project that had to suffer some modifications due to external factors outside our control. The emergence of this new scope, when the project was already on going, created some impact but we able to adapt to it and tried hard to clarify again the new changes with the company. We worked together as a team in order to respond to the client's requirements and challenges and to present the final result expected by them.

Given the results from belbin test I was able to know the three team roles more related to my personality and the three less related. These results' analyse allows me to reflect about the abilities that I already have naturally and the ones that I need to improve to be a more complete team member in group projects such as this one.

## Individual Reports - Ana Carolina Costa (2/2)

### Belbin Results

Prospector

Strategist

Finisher

Monitor

Team Worker

President

Having in mind the importance of keeping a work pace in every project so the tasks included in the action plan can be accomplished on correspondent deadlines, I understand that I may not be that much related to the finisher role. Although, I am usually the person who detects the mistakes, confusions or inaccuracies on the reports and final versions, I need to become more aware of the deadlines and focus more on accomplish and finish the tasks on time rather than overthinking about possible and available options. Together with the finish role, It is also important that I develop the strategist role, concentrating my attention in performing the tasks previously agreed and leading the group towards the same established goals so everyone is aligned and focus towards the same purpose . With the Prospector being the role less adapted to me, I comprehend that I need to improve my communication skills and to keep my attention and focusing particularly when working under very high pressure, in order to think rationally and be efficient.

It is very important to clearly define, since the beginning of any group project, the goal and main questions to answer, as well as the work plan for the project. The plan will help to identify the main difficulties and set a plan with all the actions ordered by execution priority. This is something that I usually tend to do in my work projects, in order to be developed in an efficient and successful way. Although president was the first role assigned to me, I consider that I have president and team work skills in the same proportion. This two skills complement each other, allowing me to be a respectful and confident group member, softening the domain and imposition related to the president role. I always take into account everyone's ideas and opinions, so that everyone is aligned with the project's evolution. Moreover, it is also extremely important to think rationally and objectively during the project in order to analyze all the available options. However, sometimes I take a considerable time to make my decisions given this personal attribute.

Developing my master thesis in such an enrichful environment and context was a great opportunity to develop an interesting number of professional and personal capacities.

## Individual Reports - Francisco Apolónia (1/2)

### Main Apprenticeships

Syndication	Versatility	Communication	Organization
To syndicate is to combine or undertake a joint effort to achieve common goals, and that is exactly what the team has done during the project timeline. The permanent contact with the client was a key success factor, based on their extremely positive attitude and on the teams' humbleness of recognizing its limitations. Ultimately that resulted on constant project's guidance, feedback, deliverables validation and alignment of expectations between the two parts.	The project brought three months of so diverse tasks that the versatility was one of the most required skills. From learning how to develop the correct and proper methodology to interview 100+ customers by telephone, passing through countrywide in-field observations, the job comprised various different phases demanding different competences. Being able to address each phase and to develop the right tools is something I surely take to my professional life.	Another key success factor for teams working together. This project confirmed, as if necessary, the importance of a clean, objective and respectful way of communicate. Its effects go beyond merely professional communication, reaching the type of relationships built and deeply influencing them. The main take away: always express one's ideas for the team, understanding how crucial it is to listen others and their perspectives on the subject.	Short-time, great expectations and even greater responsibility. Those were the team's start project acknowledgments. How to deal with it? Organization. By designing a detailed work plan and respective deadlines, dividing tasks whenever it was possible, given each ones specific capacities, and identifying each phase top priorities Once again, the way the team manage to organize itself illustrates how details can greatly influence final results.



When it comes to team projects, it is crucial one perceives and shares his main qualities in order to make the difference in those areas and offset the possible characteristics missing among the others.

## Individual Reports - Francisco Apolónia (2/2)

### Belbin Results

Strategist

Intellectual

Operational

Finisher

President

Monitor

It is also important to understand each one's main flaws, individually, to personally overcome them, but also as a team to define each one's roles and main fields of contribution.

Regarding Operational role, I am convinced that being able to define and apply frameworks and strictly follow and commit to established methodologies is something I must continue to work on, since it was something that clearly tested me in during this experience.

Creativity and the capacity of constantly generate new ideas and perspectives is something I also should develop, even though it represents a challenge for a focused and objective person as I tend to be.

To add my opinion and discuss the possible strategies the team should undertake to complete the project is something I feel comfortable with, however, to think and design them from the beginning is, for now, a challenge for me.

During the project I tried that my contribution reflected my main qualities and capacities, and I truly believe that happened.

The three team roles that Belbin analysis attributes me, represent an interesting combination, that fits the way I behave while team member. I see myself as someone who submits the team to a certain standard of performance by results-oriented perspective, which connects with the Belbin Monitor definition.

Regarding President role, it is not so clear, since I do always have the coordination and clarification concern as well as understand the importance of keep motivating the team, besides that I consider myself much more a Team Worker.

The Finisher role partly suits me. I am not as perfectionist and concern with detail as the role claims but, in the other hand, I do keep the group with a sense of responsibility and, somehow, urgency at every step of the project, as I believe it is the best way to ensure strong and solid final results.

1. Individual Reports

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2.1. Analysis

2.1.1. Observation Grid

2.1.2. Interview Script

2.1.3. SPSS analysis

2.2. Recommendations

2.2.1. Metaplan Methodology

## **2.1.1.Observations Grid**

For the observation phase, a grid was built (after some test-observations) in order to recognize every single step and interaction with the company, experienced by the client, during the process.

## Observation Grid (1/3)- Purchase Channel, Bottle purchased and Delivery levels

During the observations phase, in order to analyse the LPG bottled home delivery service clients, the group elaborated a observation grid to register some information about the clients observed. This information collected with this grid includes:

- Age
- Genre
- Delivery schedule (morning or afternoon)
- Address (Urban or rural residence)
- Zone/Region
- Habitation type (apartment or house)
- Payment's moment
- Payment method
- Purchase Channel
- Amount of purchased bottles
- Type of purchased bottles
- The presence of the client when the delivery is made
- The installation of the bottle
- The existence of reserve bottle

For the observation phase, a grid was built (after some test-observations) in order to recognize every single step and interaction with the company experienced by the client during the process.

## Observation Grid (2/3)- Purchase Channel, Bottle purchased and Delivery levels

ID	Process: level 1	Process: level 2	Process: level 3	Verified Step	Description
1	Purchase Channel	Store	Go to the nearest or more convenient store		
1	Purchase Channel	Telephone call	Store		
1	Purchase Channel	Telephone call	Distributor		
1	Purchase Channel	On-site	Street's approach		
1	Purchase Channel	Online	Online order		
1	Bottle purchased	Quantity	Only one		
1	Bottle purchased	Quantity	More than one		
1	Bottle purchased	Butane Bottled Gas	Butane 13kg		
1	Bottle purchased	Butane Bottled Gas	Butane 12 kg (Pluma)		
1	Bottle purchased	Propane Bottled Gas	Propane 11 kg		
1	Bottle purchased	Propane Bottled Gas	Propane 11 FL kg		
1	Bottle purchased	Propane Bottled Gas	Propane 45 kg		
1	Delivery	Customer Presence	Present		
1	Delivery	Customer Presence	Absent		
1	Delivery	Distributor's Arrival	Listen the doorbell or the knocking on the door		
1	Delivery	Distributor's Arrival	Waiting with the door open		
1	Delivery	Verify the identity of the delivery agent of LPG bottled	Verify the identity of the delivery agent of LPG bottled		
1	Delivery	Ask for bottle exchange	Ask for a bottle in better conditions		
1	Delivery	Entry inside the house	Entry inside the house		
1	Delivery	Empty Bottle's Location	Still installed		
1	Delivery	Empty Bottle's Location	Uninstalled		
1	Delivery	Reserve Bottle	Reserve Bottle's existence		
1	Delivery	Installation	Bottle's installation by the agent		
1	Delivery	End of the process	Follow the delivery agent to the door		

For the observation phase, a grid was built (after some test-observations) in order to recognize every single step and interaction with the company experienced by the client during the process.

## Observation Grid (3/3) - Personal data and Payment levels

ID	Process: level 1	Process: level 2	Process: level 3	Verified Step	Description
1	Personal Data	Age			
1	Personal Data	Genre (Masc)			
1	Personal Data	Delivery Schedule	Morning delivery		
1	Personal Data	Delivery Schedule	Afternoon delivery		
1	Personal Data	Adresse	Urban		
1	Personal Data	Adresse	Not Urban		
1	Personal Data	Zone/Region	Aveiro		
1	Personal Data	Zone/Region	Anadia		
1	Personal Data	Zone/Region	Porto		
1	Personal Data	Zone/Region	Braga		
1	Personal Data	Zone/Region	Azeitão		
1	Personal Data	Zone/Region	Setúbal		
1	Personal Data	Zone/Region	Amadora		
1	Personal Data	Habitation Type	Apartment		
1	Personal Data	Habitation Type	Morada		
1	Payment	Payment's Moment	Before the delivery		
1	Payment	Payment's Moment	After the delivery		
1	Payment	Payment's Moment	During the delivery		
1	Payment	Items to pay	LPG bottle		
1	Payment	Items to pay	LPG bottle's deposit ( in case there is no empty bottle for exchange)		
1	Payment	Payment Method	Cash with the exact amount		
1	Payment	Payment Method	Cash with change		
1	Payment	Payment Method	Card		
1	Payment	Payment Method	Bank transfer		
1	Payment	Payment Method	ATM reference		
1	Payment	Payment Method	Presentation of discount coupons and promotions.		
1	Payment	End of the process	Ask for receipt with tax number		
1	Payment	End of the process	Price's complaints		

## **2.1.2.Interview Script**

To perform the qualitative research, the interview script was created, divided by specific phases, addressing specific qualitative information needs. After tested and validated by Galp, it was used to make the phone-interviews.

## Interview Script (1/5) - Order

Action	Question	Answer
	Good morning, my name is _____ and i'm conducting a study to develop my master thesis. This study is about the LPG bottled market. Do you have LPG bottles at home? If yes, would kindly answer a few questions about it?	
1	<b>Order</b>	
	In your opinion, what's the main advantage of this service?	
	Why do you use the home delivery service?	
	Which channel do you, usually, choose to buy the bottle?	
	Online	
	Telephone (Shop or Distributor directly)	
	Distributor	
	Store	
	Presentially	
	On-site	
	Street	
	Why do you opt for this channel to complete your order?	
	Is there any reason for not using the others?	
	Where did you obtain the distributor contact?	
	Recommendation	
	Own Research	
	Publicity or Advertisement	
	Others	



To perform the qualitative research, the interview script was created, divided by specific phases, addressing specific qualitative information needs. After tested and validated by Galp, it was used to make the phone-interviews.

## Interview Script (2/5) - Home Delivery Service

Action	Question	Answer
	Have you ever used the home delivery service?	
	If not, why did you start using it? Which one did you use before?	
	Which type of bottle do you buy?	
	Butane bottles	
	Butane 13kg	
	Butane 12 kg (Pluma)	
	Propane bottles	
	Propane 11 kg	
	Propane 11 kg (liquid phase)	
	Propane 45 kg	
	Mini gás	
	Don't know the bottle's type neither the name	
	To which goals do you use LPG?	
	Home heating	
	Water heating	
	Kitchen	
	Equipments. Which?	
	Others	
	In which kind of home do you live?	
	House	
	Apartment	

To perform the qualitative research, the interview script was created, divided by specific phases, addressing specific qualitative information needs. After tested and validated by Galp, it was used to make the phone-interviews.

## Interview Script (3/5) - Home Delivery Service and Scheduling

Action	Question	Answer
	Do you normally have a spare / reserve bottle at home?	
	If yes, why?	
	If no, why not?	
	Does the distributor provide any kind of recommendations or suggestions?	
	If yes, do you follow them?	
	Why?	
	If not, if he did, would you follow his advices?	
	Why?	
<b>2</b>	<b>Scheduling</b>	
	Are you satisfied with the delivery hours of your distributor?	
	Why? If no, what would you change?	
	Usually, for which period do you schedule the bottle delivery?	
	To which specific hour?	
	During which specific day or month?	
	Do you order during the weekends?	
	Normally, are you available to receive the order yourself?	
	If not, who recives it?	
	Do you pay during the delivery?	
	If not, when do you usually pay?	
	Have you ever rescheduled or cancelled an order?	
	If yes, why? How did the process developed?	

To perform the qualitative research, the interview script was created, divided by specific phases, addressing specific qualitative information needs. After tested and validated by Galp, it was used to make the phone-interviews.

## Interview Script (4/5) - Delivery Moment

Action	Question	Answer
	For you, in an idilic service	
	Which hour do you believe Galp should be able to deliver the bottles?	
	How much time would you be to wait for the service?	
<b>3</b>	<b>Deliver</b>	
	What's your confidence degree with the distributor who delivers the bottle?	
	From 1 to 5 (5-Totally trust him, 3-neutral, 1- I don't trust him at all)	
	Do you usually receive the bottle at the time scheduled with the distributor?	
	If not, how much time do you wait in average?	
	If not, did the distributor ever failed a delivery?	
	Where does the distributor leaves the new bottle?	
	Inside home	
	Outside home	
	Does the distributor install the bottle?	
	If not, why?	
	Do you usually have an empty bottle to change?	

To perform the qualitative research, the interview script was created, divided by specific phases, addressing specific qualitative information needs. After tested and validated by Galp, it was used to make the phone-interviews.

## Interview Script (5/5) - Installation, Payment and Overall Satisfaction

Action	Question	Answer
<b>4</b>	<b>Instalação</b>	
	How does the bottle is replaced and installed?	
	Do you have the empty bottle yet installed?	
	Is the empty bottle already uninstalled?	
	Are you satisfied with the installation support?	
	If not, which are the negative aspects?	
	Does the reseller ever ask about and recommend regarding technical assistance?	
	Do you have any improvement suggestion in this field?	
<b>5</b>	<b>Payment</b>	
	Do you pay for the delivery service?	
	If yes, do you think that the price is adequate?	
	Which kind of payment method do you preferably use?	
	Do you give any tip to the distributor?	
<b>6</b>	<b>Client Satisfaction</b>	
	How do you evaluate your purchase experience regarding your expectations?	

## **2.1.3.SPSS Analysis**

During the SPSS analysis, some specific methods, such as the Hierarchical method and Ward's method, were used to elaborate the clusters.

## SPSS analysis (1/2)

### Hierarchical Method<sup>3</sup>

The hierarchical methods are characterized by the act of having a hierarchy and can be divided into agglomerative and divisive methods. The agglomerative hierarchical method, used in this project, begins by considering each  $n$  individual as a separate cluster. In the diverse phases, the clusters are formed by agglomerating the ones in the previous phase, i.e., grouping the objects (individuals or clusters) into clusters each time bigger than the previous. In each phase, the objects with less distance between them are grouped. This process is done until all individuals are in the same cluster. It is then necessary to decide how many clusters should be retained since  $n$  is too much and 1 is too little.

### Ward's method<sup>1</sup>

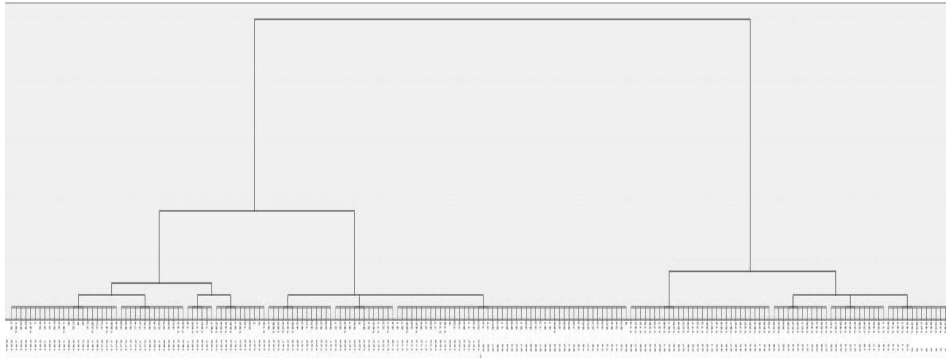
Ward's method consists on the notion that the distance between two clusters is how much the sum of squares will increase when they merge. In the hierarchical clustering method, the sum of squares in the beginning is zero, because every point is in its own cluster, and then grows as the clusters are merged. The objective of Ward's method is to maintain the growth as small as possible. Given two pairs of clusters whose centers are equally far apart, Ward's method will prefer to merge the smaller ones.

### Dendrogram<sup>2</sup>

The dendrogram gives a graphical vision of the aggregation and the fusion coefficients dimension, which consists on the measure of the distance at which the clusters are being aggregated. The horizontal axis of the dendrogram represents the distance or dissimilarity between clusters. The vertical axis represents the objects and clusters. Each joining (fusion) of two clusters is represented on the graph, by the merger of two horizontal lines into one. The horizontal position of the merge, shown by the short vertical bar, gives the distance (dissimilarity) between the two clusters. It is possible to observe not only the individuals that are being aggregated, but also the jump between aggregations given by the fusion coefficient. This will be relevant information to the choice of the number of clusters to retain. By cutting the dendrogram with a vertical arrow, the number of clusters and its composition will correspond to the number of horizontal lines cut with that arrow.

The analysis of the fusion coefficients and the dendrogram supported the number of clusters chosen.

## SPSS analysis (2/2)



Agglomeration Schedule

Stage	Cluster Combined		Coefficients	Stage Cluster First Appears		Next Stage
	Cluster 1	Cluster 2		Cluster 1	Cluster 2	
1	67	191	,000	0	0	29
2	47	189	,000	0	0	37
3	32	181	,000	0	0	165

...						
183	10	57	306,692	180	145	193
184	4	36	316,288	178	160	191
185	100	104	326,378	176	152	189
186	113	114	336,725	168	177	195
187	24	28	347,511	181	133	190
188	2	14	360,652	182	144	194
189	100	110	376,014	185	174	192
190	1	24	396,105	175	187	194
191	3	4	417,563	179	184	193
192	99	100	439,785	172	189	195
193	3	10	464,691	191	183	196
194	1	2	495,420	190	188	196
195	99	113	539,263	192	186	197
196	1	3	655,118	194	193	197
197	1	99	980,247	196	195	0



## **2.2.1. Metaplan Methodology**



Metaplan methodology is used as a tool to facilitate the development of opinions, ideas or solutions, for a specific problem identified. This process also eases group-work organization and focus on the solutions to address the issue at stake.

## Metaplan methodology

### Subcategorize the problem

The initial cause that motivated the use of the metaplan methodology must be divided into small different and ideally independent categories. The problem or question that needs to be solved will, therefore, be approached more specifically and not as a whole complex issue.

### Create Individual Input

Once well-defined categories are established, those should be tackled individually. Each person is then required to, during a predetermined period of time (e.g. 5min), think of ideas that would mitigate the precise detail being addressed. The ideas should be written on small cards colored according to the category. Finally, the ideas should be posted on the board.

### Discuss Results in Group

Ultimately, each idea is shared by who created it, and its pertinence and consistency are discussed in group. The process is concluded after each group member rates the ideas or initiatives, based on each one's perceived importance. The final results arise from the combination of the ratings collected.

Metaplan methodology is used as a tool to facilitate the development of opinions, ideas or solutions, for a specific problem identified. This process also eases group-work organization and focus on the solutions to address the issue at stake.

## Metaplan methodology - Team's output



Following the metaplan methodology, the group had five minutes to generate ideas for each pain point, writing them on post-its and proceeding to place them on the wall. The brainstorming session was divided by personas.

1. Individual Reports

2. Methodology

3. External Analysis

4. Research

5. Recommendations

3.1. Players in the National Market

3.2. International Benchmark

## **3.1.Players in the National Market**

Performing a national benchmark helps to reinforce the idea of a market with extremely similar product and service offerings by the diverse players. It is also important to notice the specific innovation and differentiation paths that are being followed.

## Portuguese Market Benchmark

						
<b>Market Share*</b>	40%	10% - 12%	20% - 22 %	20% - 22%	>3%	Unknown (entered recently)
<b>Home Delivery Service</b>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Price Perception** (Ranking)</b>	1º	4º	3º	2º	5º	-
<b>Innovation / Differentiation Driver</b>	Resale Network	6kg Bottle	Online Portal 6kg Bottle	Rubis Butane Light Bottle	Price <b>Lisboa:</b> Delivery App Prio Open 9h - 22h	Price X-Light Bottle (lighter)

\* Relatório Autoridade Concorrência

\*\*Tracking Garrafa, Galp

An analysis of the competitors' customers allows us to perceive potential improvement axes for Galp, as well as to understand why customers change to the main competitors - Repsol, Rubis e OZ.

## Competitor's Customers Insights



#11

"Before I bought Galp, but when I moved to this house there was no Galp's pressure regulator available, so the salesman advised me to buy Rubis, which lasts the same and it is cheaper." (Price and Pressure Regulator)

"This one leaves no residues, sucks until the end." (Durability)



#2

"I liked the blue bottles, lighter and more durable, but I only bought Galp because that brand stopped selling in my local area." (Weight and Durability)

"The Galp reseller passed away, and I changed to OZ because of the people's friendliness." (Sympathy)



#5

"I only use for the grill in the summer and the smaller bottle of Repsol is the most suitable and that occupies less space. I do not think any of the other brands has one so small." (Application)

"Repsol is the cheapest because Galp increases the price first. In that period, it 50 cents more cheaper, it makes a difference." (Price)

"The little one I go to the store to buy, and I buy Repsol because it is cheaper and has the same quality. The biggest one is heavy, I have to buy Galp because they are the only ones that deliver at home." (Price)



## **3.2.International Benchmark**

Butagaz has innovative and digital sales channels available to its customers, from an application to the mobile phone, to a partnership with a grocery shopping delivery system to vending machines.

## Sales Channels - Butagaz, France



### Butagaz's Stores

- 17 thousand specialized stores in France;
- Supermarkets, small shops, service stations, etc

### "Drive Butagaz" app:

- The client can find the nearest reseller;
- He orders online the gas bottles, on the same "Drive" app where the shopping is done;
- He carries the gas bottle at the same time he picks up the grocery shopping

### "Click & collect butagaz" App:

- The user locates the available bottles;
- Chooses the nearest selling point;
- Books the selected bottle for 48 hours;
- Collects the bottle at any time by opening the bottle lock with the application.

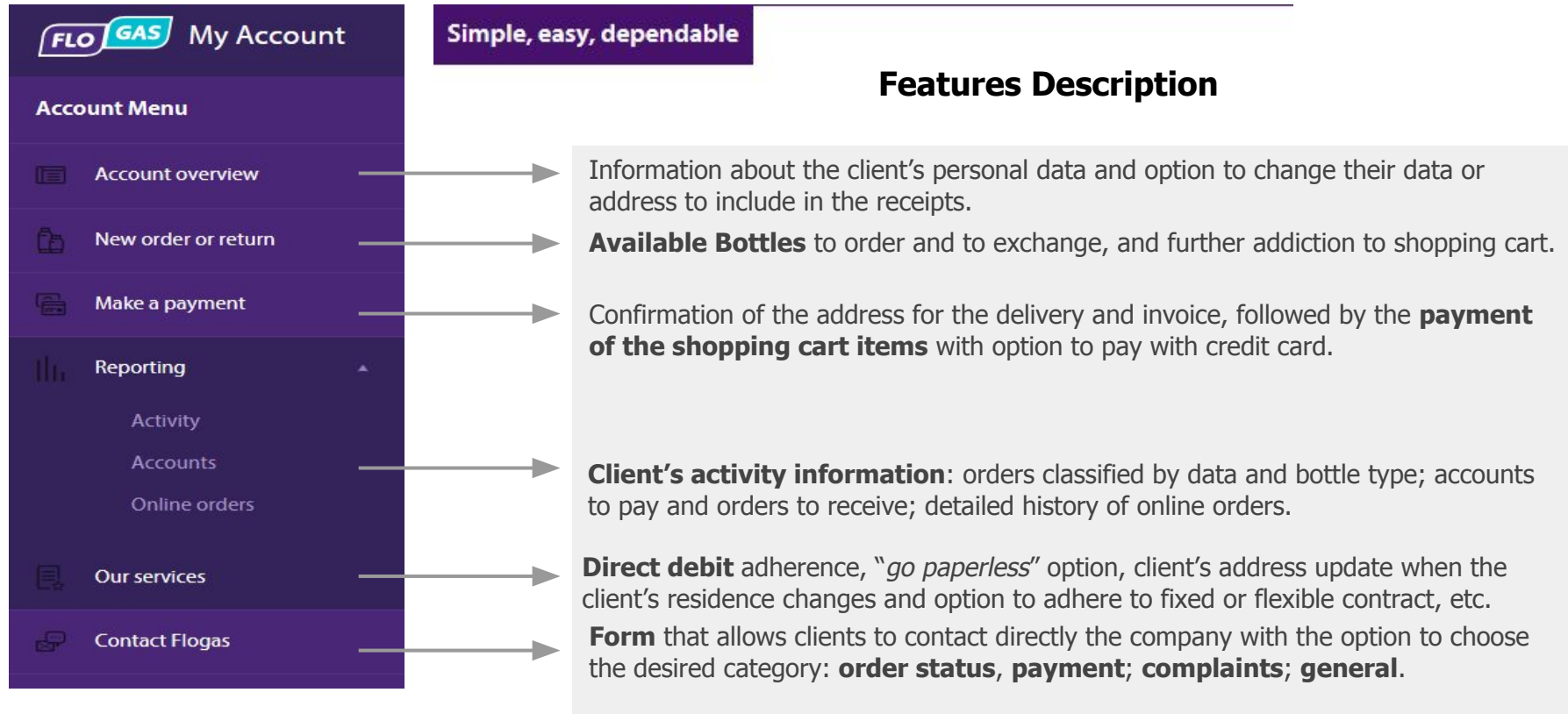
### Vending Machine

- Buy a bottle in an automatic bottle dispenser;
- They are available 24 hours a day, 7 days a week.
- It works as a self service system.



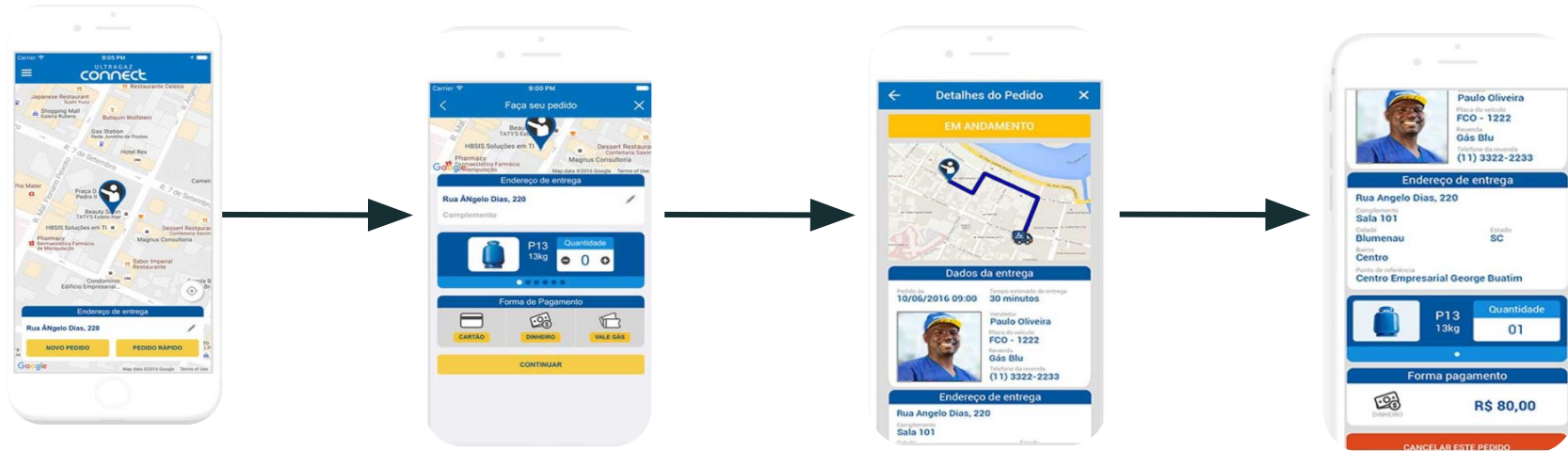
Flogas is a company from United Kingdom and stands out with the features from its website and particularly from its clients' oriented platform, such as the "go paperless" solution that allows the online access to the receipts and invoices from the clients' orders.

## Customer Account - Flogas, U.K.



The mobile application provided by Ultragaz, a Brazilian LPG bottled company, excels for its simplicity, efficiency and range of features valued by the client, such as the order tracking and delivery status.

## App - Ultragaz, Brazil



**Address Confirmation,**  
for the location  
of the nearest  
delivery car.

**Choice of the  
bottle to order,  
quantity and  
payment method -  
card, money or  
discount coupons.**

Information about  
the delivery details  
and **real-time  
vehicle tracking.**

**Identification of the  
driver** who will make  
the delivery, to enable  
**evaluation by the  
client.**

Supergasbras is a Brazilian LPG bottled company that brought to the market an original way to order LPG bottled, that it is a very innovative and simple solution - a Wi-Fi connected button named "Superbotão" (super button).

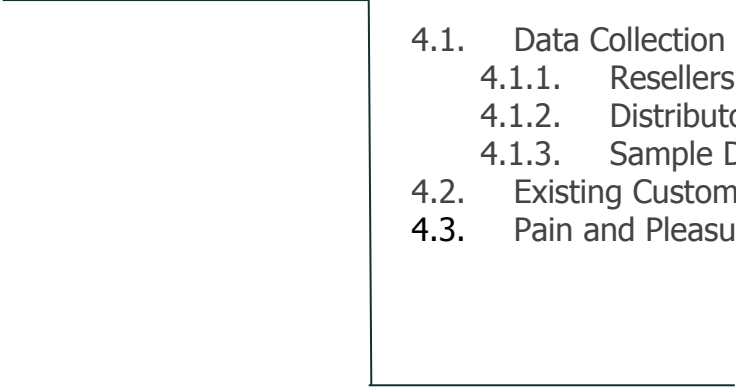
## SupergasBras, Brazil

### Innovative solution to simplify the LPG bottled order

- The **"Superbotão"** device is requested online (through a specific website) **or by phone call** (free of charge) - filling out a form with personal information such as name, email, address, phone number and consumer data.
- The order is **automatically made** with a **squeeze** on the "Superbotão" and the nearest **distributor receives the notification**.
- The customer **is able to follow-up the order** status by just checking **which color the device displays**: while it is **blue**, the order is being processed; then it changes too **green**, meaning the order is confirmed and it will be delivered soon - reinforcing it by sending a SMS.
- Finally, the bottle is delivered to client's house, the payment is made and the **process is concluded**.



1. Individual Reports
2. Methodology
3. External Analysis
- 4. Research**
5. Recommendations

- 
- 4.1. Data Collection Phase
    - 4.1.1. Resellers' Insights
    - 4.1.2. Distributors' Insights
    - 4.1.3. Sample Description
  - 4.2. Existing Customer Journeys
  - 4.3. Pain and Pleasure Points

## **4.1.1. Resellers' Insights**

The first line resellers represent Galp brand for the large majority of the final consumers, mainly because clients only interact with them directly. Therefore it is also relevant to understand the resellers business perspective.

## Insights - Meetings with the 9 Resellers from the visited Regions

### Regarding the Bottles

- The clients normally have the empty bottle to change, and therefore just pay the deposit once;
- The most sold bottle is butane 13kg;
- The majority of the clients do not distinguish propane and butane bottles: they order theirs by its color;
- Customer are becoming increasingly sensitive to the bottle color, they associate better conditions and cleanliness to the new orange bottle;
- The insurance existence is largely unknown by the clients.

### Regarding Home-Delivery Service

- The most relevant aspects for the client are the schedule, distributor's sympathy and the cleanliness and appearance of the bottle.
- Most of the home-delivery orders are made through telephone;
- Clients who order the bottle for reserve normally do not ask for installation, the others typically request it;
- Nowadays, the bulk of the clients prefers the home-delivery service, and it is increasing.

The first line resellers represent Galp brand for the large majority of the final consumers, mainly because clients only interact with them directly. Therefore it is also relevant to understand the resellers business perspective.

## Insights - Meetings with the 9 Resellers from the visited Regions

### Regarding Innovation

- It is crucial to ensure the good appearance and image of the bottles, to invest in the LPG bottled segment publicity and advertisement as well as to safeguard the quality and durability of the accessories.
- Technological investment is needed, to incorporate innovation in the business;
- Galp is comfortable with its market position, however competitors and new incumbents are offering lighter, better-designed and cheaper bottles;
- Galp's loyal customer base will be replaced by new customers and generation, that are not loyal at all.

### Regarding Clients' Complaints

- Clients request specifically clean bottles and complain about the rust in the old ones;
- Customer also refer that the butane 13kg can not be used totally, there is always a part of gas that the bottle can not expel.
- The accessories condition and lack of supply hinder the attraction of new clients - inability to offer the pressure regulator.

## **4.1.2.Distributors' Insights**



The distributors said that the most regular customers' complaints concerned the condition of the bottles. Students tend to buy the first brand they have contact with, however, after verifying that Galp is more efficient at home delivery, they change their brand.

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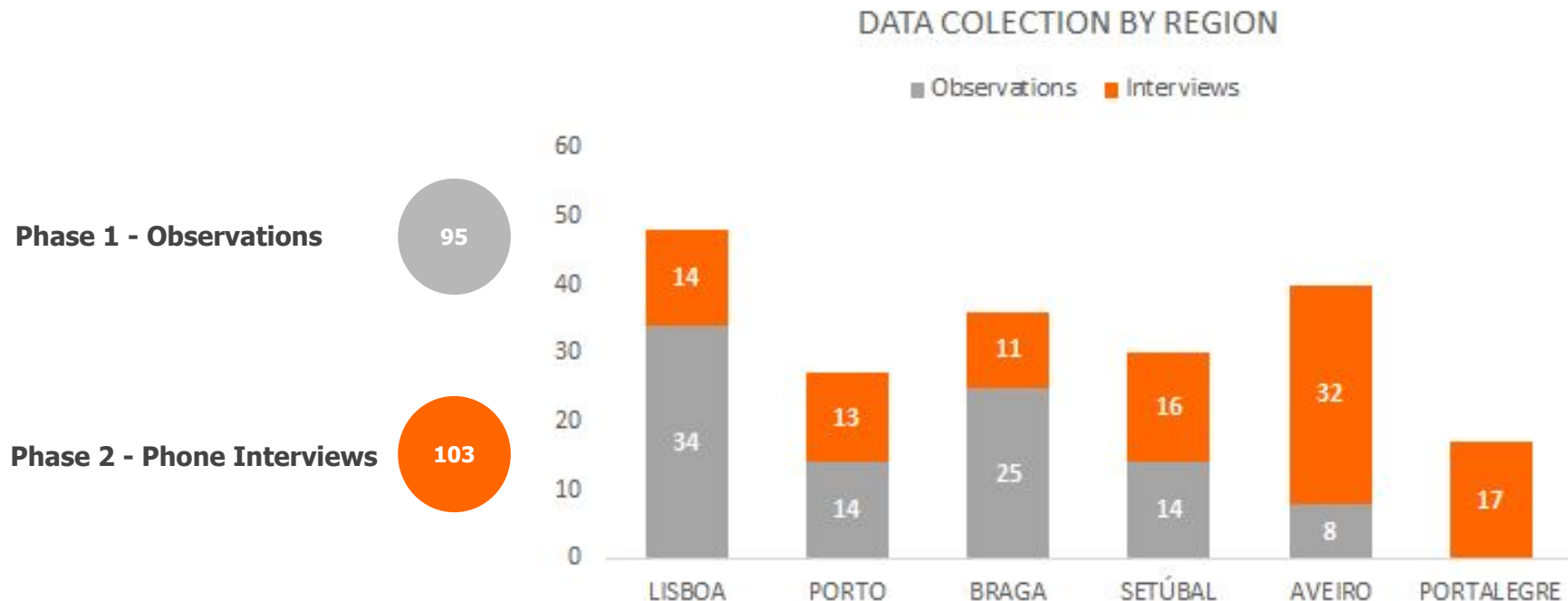
## Distributors Insights

- The most regular client's complaints are that the bottles are "black" (rust), particularly the small ones, which are dirty (grease), which causes the floor to be marked and people have to leave a plastic or cardboard under the bottle.
- When the "Pluma" bottle came out in the market it sold more because it came with the heaters. However, people started to notice that it was more expensive (for the kilos of gas that it has) and stopped buying it.
- The "Pluma" bottle does not spend the gas so easily; there is always some kilos of gas that stay trapped in the bottom (it does not have so much pressure as the other bottles).
- Clients call the distributor directly when they are in a hurry to have the bottle delivered. Sometimes, they also approach the distributor in the street when he passes by.
- In the universities, students buy the first brand that have contact with. However, afterwards, they see the Galp's distributors constantly doing home deliveries and change to Galp as result.
- Some distributors choose the dirty bottles for customers that have the bottles outside of their houses or for the 2nd line resellers.
- Some customers have a 45 kg bottle and a small 11 kg propane. So, when the 45 kg finishes they have the smaller one as a safeguard. Other reason is that customers wait for their salary or pension to have money to buy the 45 kg and buy the cheapest one (11 kg) meanwhile.

### **4.1.3. Sample Description**

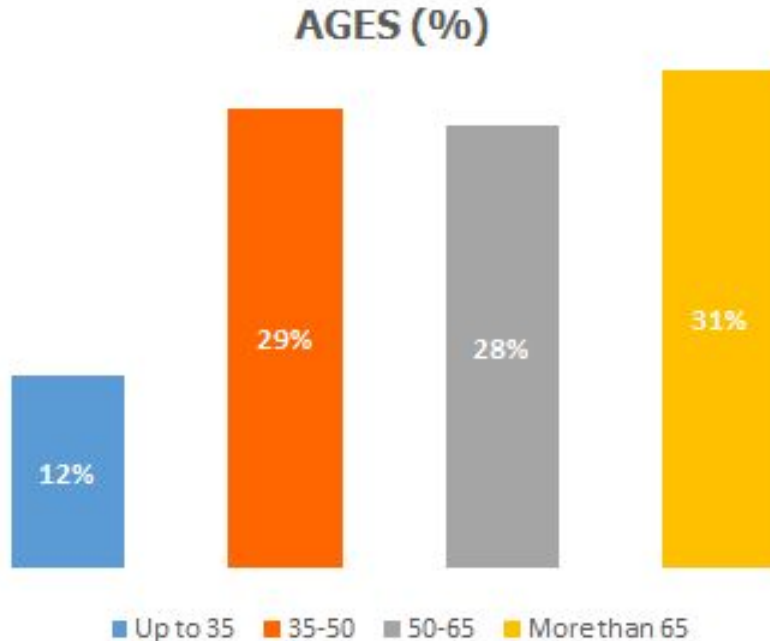
The collection of data in-field was executed in 2 distinct phases (observations and interviews). The following regions were selected according to the sales relevance and performance in each region, representing the all country besides the two main national markets: Lisboa and Porto.

## Data collection in-field by region



The information about the client's age helps to characterize the sample and consequently to identify the age range in which is included the most common client of LPG bottled, particularly from home delivery service.

## Sample Description

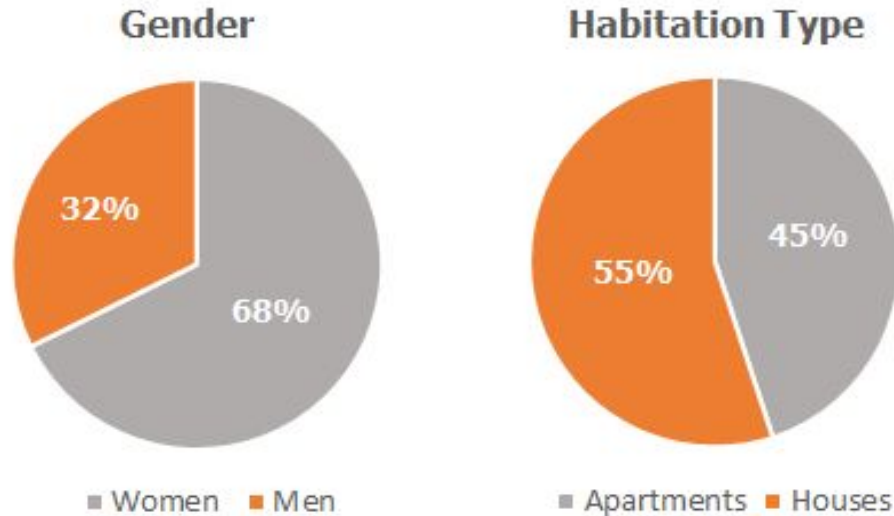


Regarding the age of our sample, more than half (59%) has more than 50 years, 29% has between 35 and 50 years old and 12% has up to 35.

This data shows that the clients of gas bottled tend to be older people, with 31% of the sample being older than 65.

The gender and the type of habitation of the clients allows the group to find out if the bottles are more purchased by people living in apartments or houses and also if the most frequent client of LPG bottled are women or men.

## Sample Description



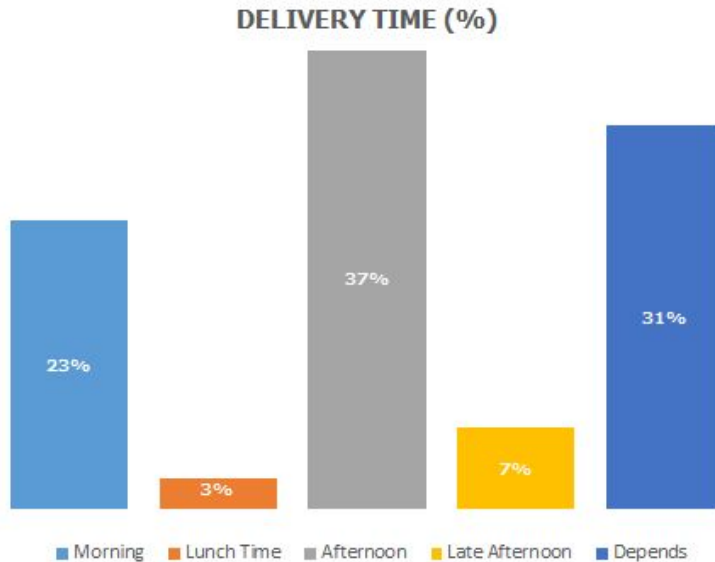
Our sample, collected during observations and interviews, is mainly composed by women, representing a percentage of 68% and indicating a tendency for this gender to be a common client of the home delivery service. However, there is still a considerable number of male consumers, with a percentage of 32%.

Regarding the habitation type, the majority of the clients lives in apartments, representing 55% of the sample.

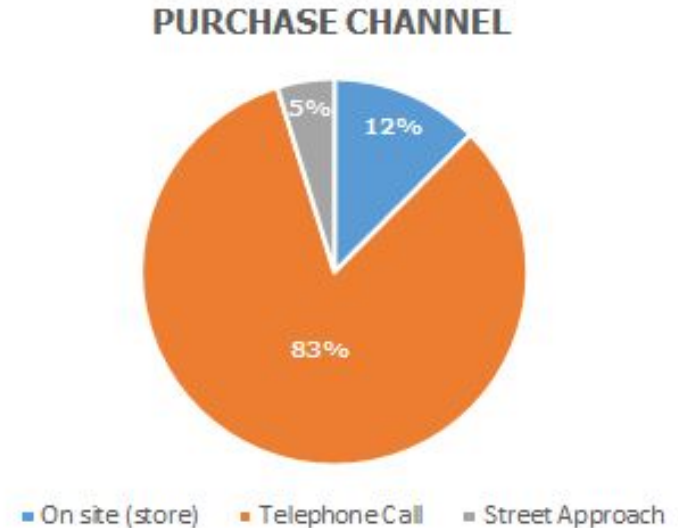
The information about the preferred delivery time and the purchase channel from each client helps to understand the moment of the day when there might be more requests, as well as the periods when it would be better to have more distributors to respond to all the requests.

## Sample Description

\*Clients were allowed to choose more than one option.



The period of the day when clients prefer to receive the bottle is during the afternoon (37% of the sample). Furthermore, 23% of them prefer to receive the bottle in the morning, 3% prefer during lunch time and 31% of the clients do not have a preferred delivery time, depending on the situation.



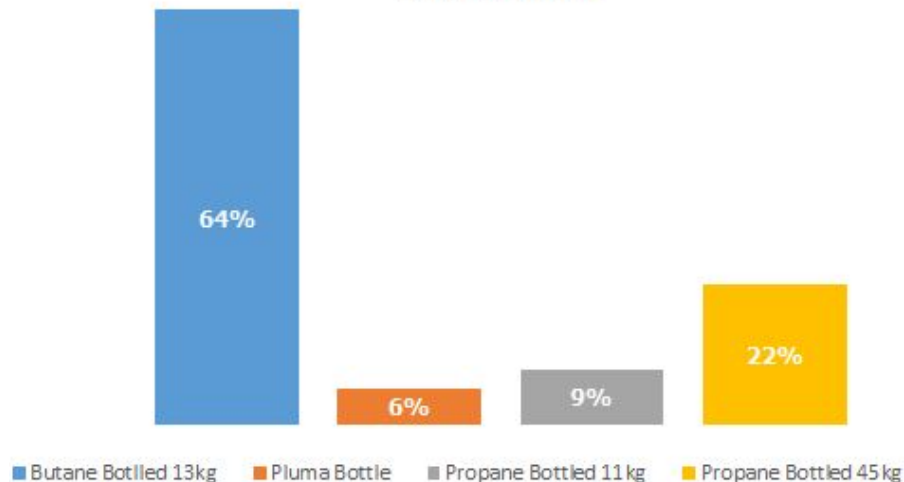
The most chosen purchase channel among clients is the telephone call option, being used by 83% of the sample. The other channels used are the order on-site (in the stores) and the order by street approach, representing 12% and 5% of the sample, respectively.

The type of the bottle purchased by each client and the ownership of a reserve bottle help the group to understand what is the most demanded bottle in the market and if clients tend to have a reserve bottle, to be less likely to run out of gas suddenly.

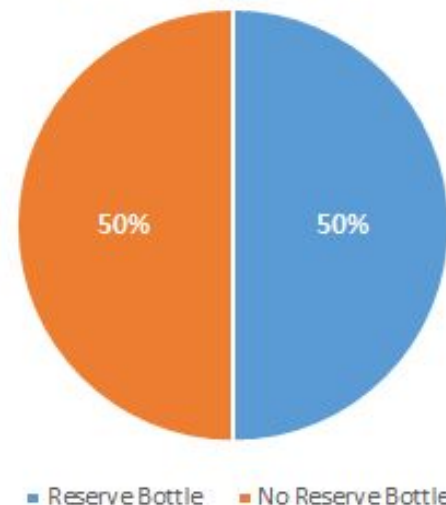
## Sample Description

\*Clients were allowed to choose more than one option.

BOTTLE TYPE



RESERVE BOTTLE



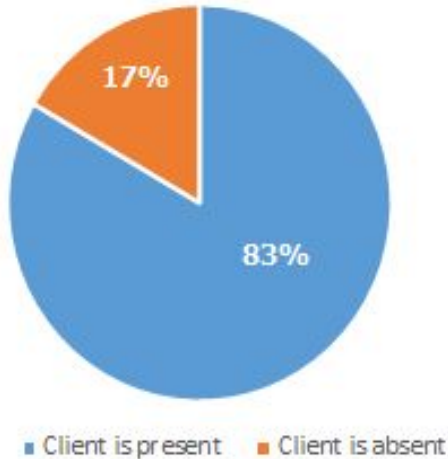
The most common bottle used by the clients in the sample is the butane 13kg, representing 64% of the sample. The three other bottles also presented in our sample are the propane 45kg, the propane 11kg, and the pluma, representing 22%, 9% and 6% of the sample respectively.

The possession of a reserve bottle by the client to ensure they do not run out of gas, when the bottle being used comes to an end, is verified in exactly half of the sample.

The variables collected regarding the client's presence and whether the distributor goes inside the client's house allows the group to understand what is the confidence and trust level between the distributors and the clients.

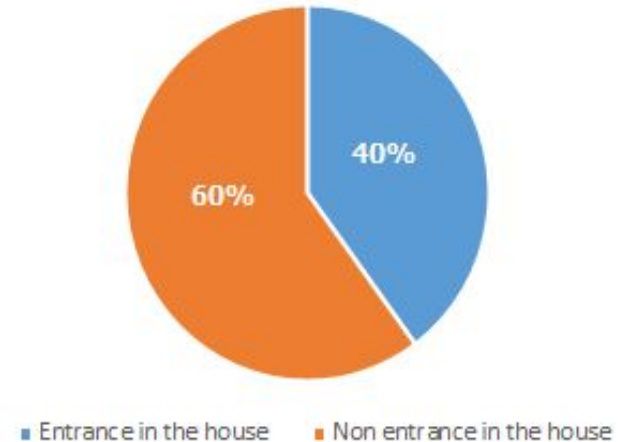
## Sample Description

CLIENT'S PRESENCE



The majority (83%) of the clients from the sample are present to receive the bottle in their houses. The remaining clients (17%) leave the empty bottle outside the door, so the distributor can exchange for the full bottle, being these situations previously agreed with the reseller .

ENTRANCE INSIDE THE CLIENTS' HOUSE

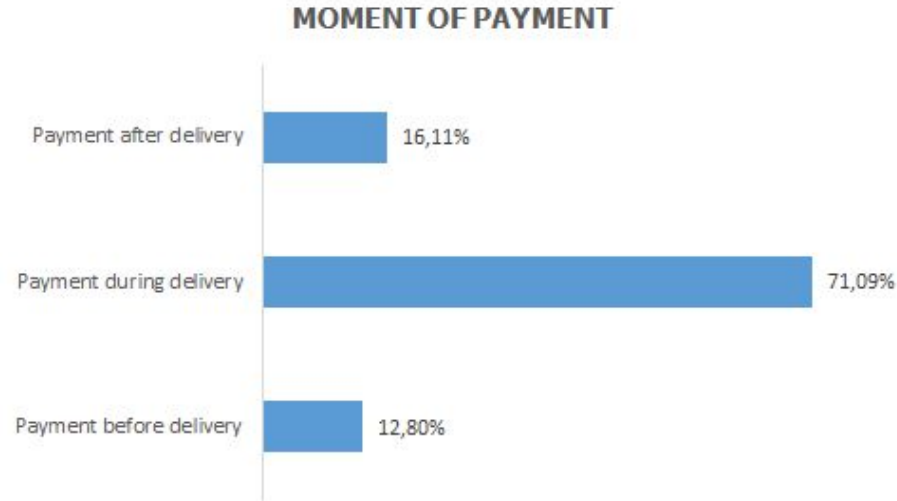


In most of the delivery cases (60%), the distributor does not enter inside the client's house, being the transaction of the empty bottle for the new one made outside the client's house, reflecting a lack of confidence between the distributor and the client.

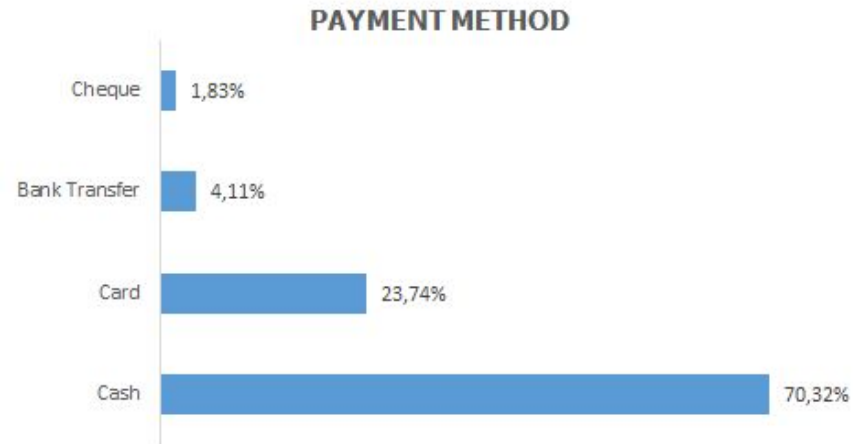


The moment of payment and the payment methods (through availability), help to understand how flexible the resellers are and how that influences the clients satisfaction levels.

## Sample Description



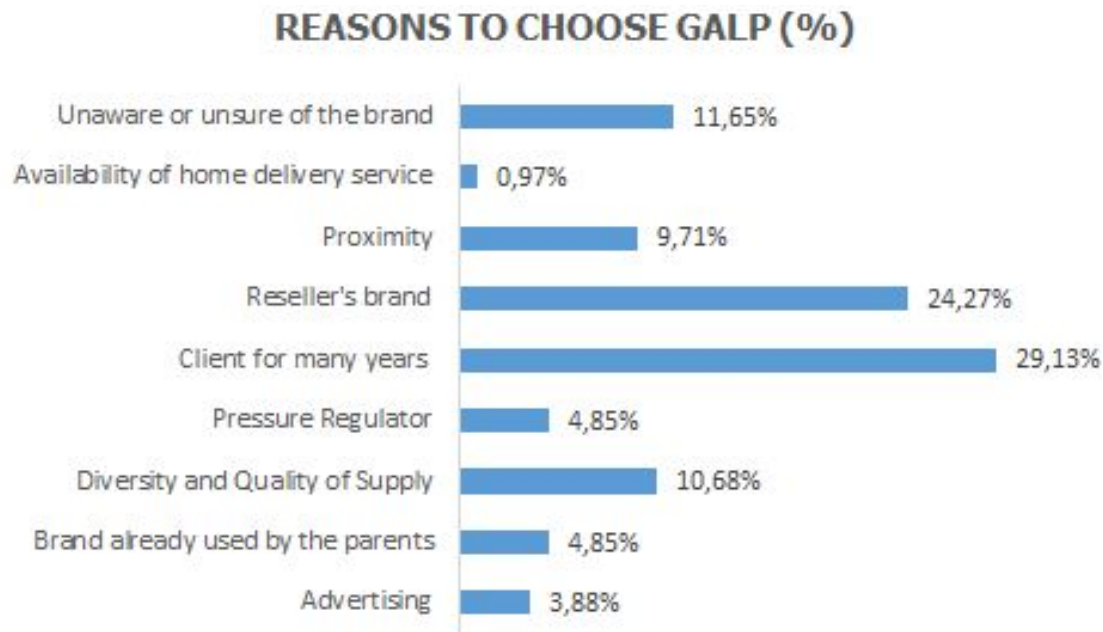
The payment is primarily done during the delivery, as it would be expected. However, when analyzed together, the payment after and before the delivery represent an interesting percentage of almost 30%, which reflects some degree of flexibility from the resellers.



Cash is the most common payment method used by the LPG bottled gas clients (70,32%). The card option represents 23,74% of the sample however, with the growing availability of ATM terminals in the distribution trucks, it might increase shortly.

From the information obtained through the interviews, it is possible to conclude that the customers mainly choose Galp specifically due to being clients for many years already or due to be the brand from their preferred reseller.

## Reasons to Choose Galp



The main reasons that lead people to buy Galp LPG bottles are:

- Long-time satisfied client (29,13%);
- Galp is the brand the preferred reseller works with (24,27%), which demonstrate their role as influencers in this market;
- Diversity and quality of supply (10,68%), highlighting Galp's portfolio adequacy.

It is also relevant to notice that 11,65% of the sample does not know or is unaware of the brand used.

## **4.2.Existing Customer Journeys**

From the data collection and respective analysis, the team identified 32 existing customer journeys, which were then filtered based on its percentual relevance.

## Existing Customer Journeys (1/2)

Order	Delivery	Installation	Payment	CJ %
Telephone	Present	Installs	Cash	19,71%
			Card	6,66%
			Bank Transfer	1,14%
			Cheque	0,51%
		Does not install	Cash	36,93%
			Card	12,48%
			Bank Transfer	2,14%
			Cheque	0,95%
	Absent	Installs	Cash	3,95%
			Card	1,34%
			Bank Transfer	0,23%
			Cheque	0,10%
		Does not install	Cash	7,40%
			Card	2,50%
			Bank Transfer	0,43%
			Cheque	0,19%

From the 32 identified and possible customer journeys, half starts with telephone order, which belongs to the first stage.

From the table, it is possible to infer that the bulk of the customer journeys are nearly insignificant, and those with lower than 7% representativity were not considered.

From the 5 customer journeys selected as the most relevant, four of them start with the telephone option, when ordering, and in the most representative one (36,93%) the order is made with the telephone, the client is present when the delivery is made, does not ask for the bottle's installation and pays with cash.

From the data collection and respective analysis, the team identified 32 existing customer journeys, which were then filtered based on its percentual relevance.

## Existing Customer Journeys (2/2)

Order	Delivery	Installation	Payment	CJ %
On site	Present	Installs	Cash	4,10%
			Card	1,39%
			Bank Transfer	0,24%
			Cheque	0,11%
		Does not install	Cash	7,69%
			Card	2,60%
			Bank Transfer	0,44%
			Cheque	0,20%
	Absent	Installs	Cash	0,82%
			Card	0,28%
			Bank Transfer	0,05%
			Cheque	0,02%
		Does not install	Cash	1,54%
			Card	0,52%
			Bank Transfer	0,09%
			Cheque	0,04%

Furthermore, analyzing the 16 customer journeys that start with the on-site order, we can see that this option is much less common, as there is only one customer journey representative, with a percentage of 7,69%.

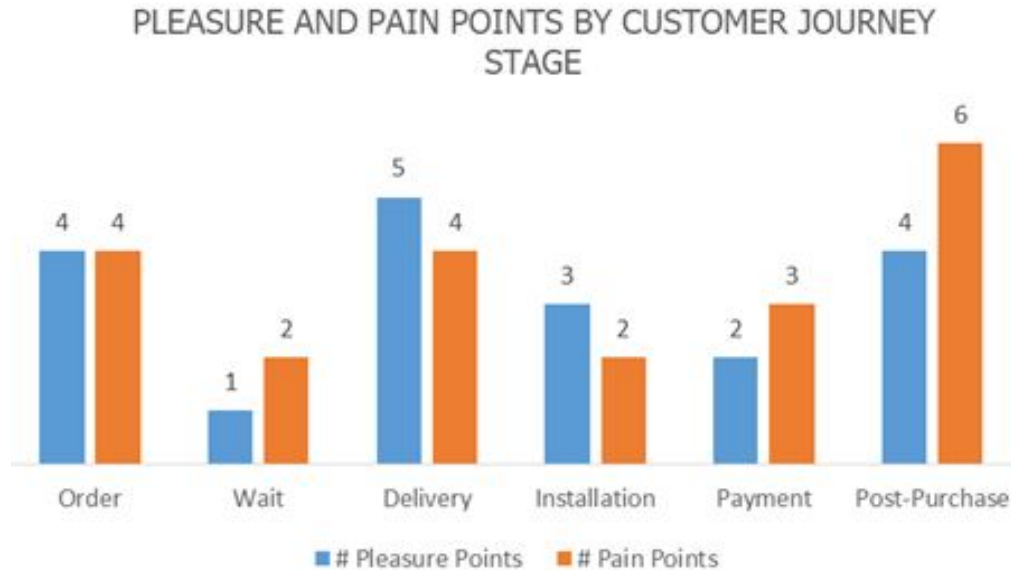
The customer journey consists on the on-site order, with the client being present to receive the bottle, where he does not ask for the bottle's installation and pays in cash.

As result, it was solely taken into consideration for the project one customer journey where the client orders the bottle on site.

## **4.3.Pain and Pleasure Points**

Matching the identified pain points to each stage of the customer journey, enables an improved understanding of the clients and should be target as priority to enhance the customer experience.

## Pain and Pleasure Points by Customer Journey Phase



The pain points vis a vis pleasure points comparison, through the stages of the customer journey, indicate a balanced relation.

The number of pain points is higher in all but the Delivery and Installation stages. In the order stage the number of both points is equal.

Also, the post-purchase moment is the one with overall greater incidence of touch points - 10.

The Wait stage represents simultaneously the phase with less touchpoints and less pleasure points.

Matching the identified pain points to each stage of the customer journey, enables an improved understanding of the clients and should be target as priority to enhance the customer experience.

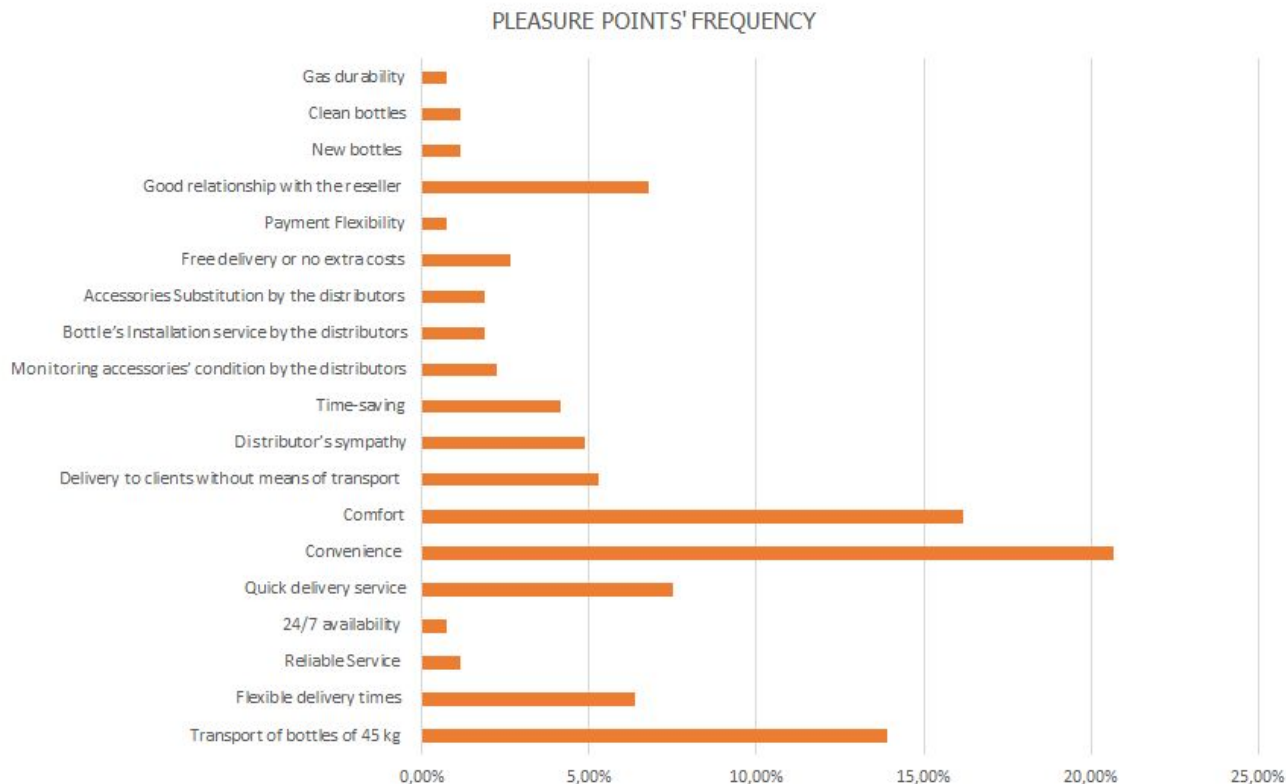
## Pleasure Points by Customer Journey Stage

PLEASURE POINTS BY STAGE	
Order	Transport of 45 kg bottles
	Flexible delivery times
	Reliable Service
	24/7 availability
Wait	Quick delivery service
Delivery	Convenience
	Comfort
	Delivery to clients without means of transport
	Distributor's sympathy
	Time-saving
Installation	Accessories condition monitoring by the distributors
	Bottle's Installation by the distributors
	Accessories' Substitution by the distributors
Payment	Free delivery
	Payment Flexibility
Post - Purchase	Good relationship with the reseller
	New bottles
	Clean bottles
	Gas durability



Matching the identified pain points to each stage of the customer journey, enables an improved understanding of the clients and should be target as priority to enhance the customer experience.

## Pleasure Points' Frequency



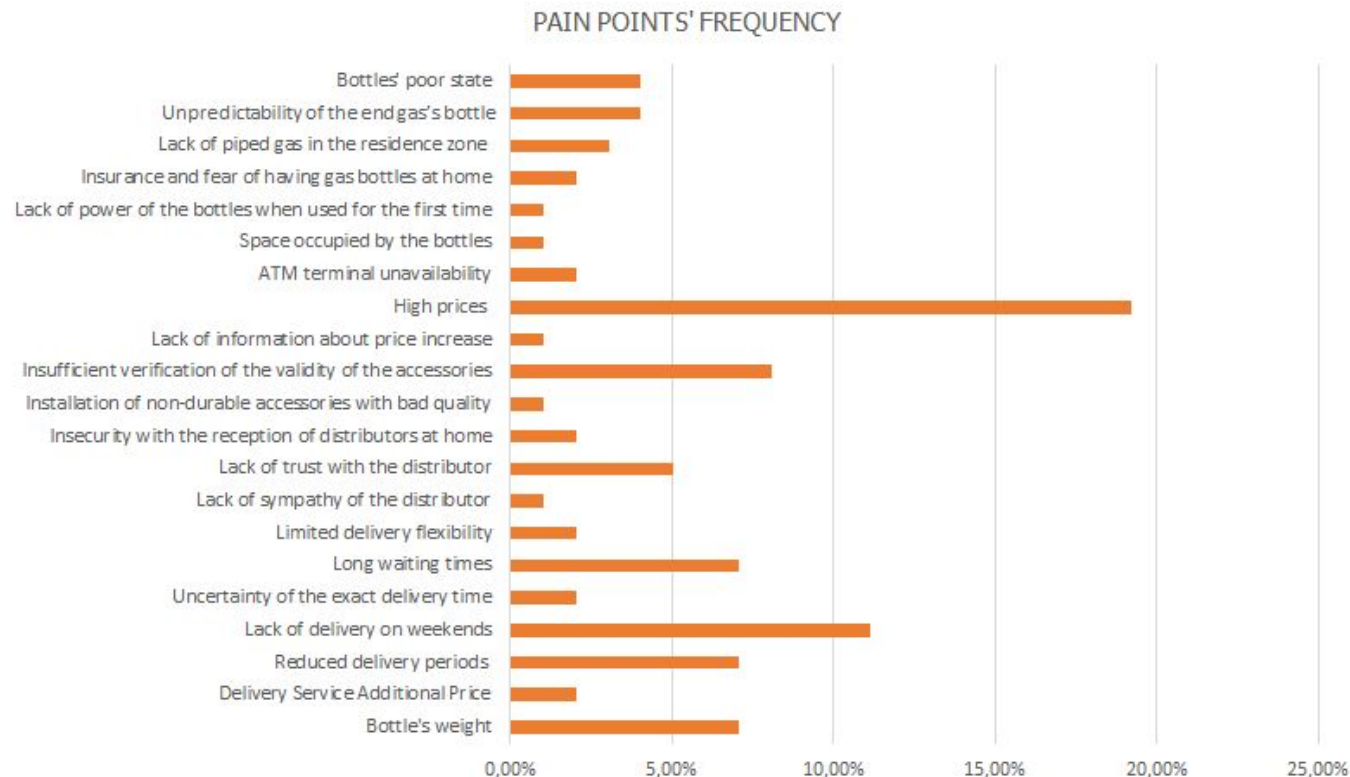
Matching the identified pain points to each stage of the customer journey, enables an improved understanding of the clients and should be target as priority to enhance the customer experience.

## Pain Points by Customer Journey Stage

PAIN POINTS BY STAGE	
Order	Bottle's weight
	Cost of delivery service
	Reduced delivery periods
	Lack of weekend delivery
Wait	Uncertainty of the exact delivery time
	Long waiting times
Delivery	Limited delivery flexibility
	Lack of sympathy of the distributors
	Lack of trust with the distributors
	Insecurity with the reception of distributors at home
Installation	Installation of non-durable (bad quality) accessories
	Insufficient verification of the validity of the accessories
Payment	Lack of information about price increase
	High prices
	ATM terminal unavailability
Post - Purchase	Space occupied by the bottles
	Lack of power of the bottles when used for the first time
	Insecurity and fear of having gas bottles at home
	Lack of piped gas in the residence zone
	Unpredictability of the end of the gas bottle
	Bottles' poor state

Matching the identified pain points to each stage of the customer journey, enables an improved understanding of the clients and should be target as priority to enhance the customer experience.

## Pain Points' Frequency



1. Individual Reports

2. Methodology

3. External Analysis

4. Research

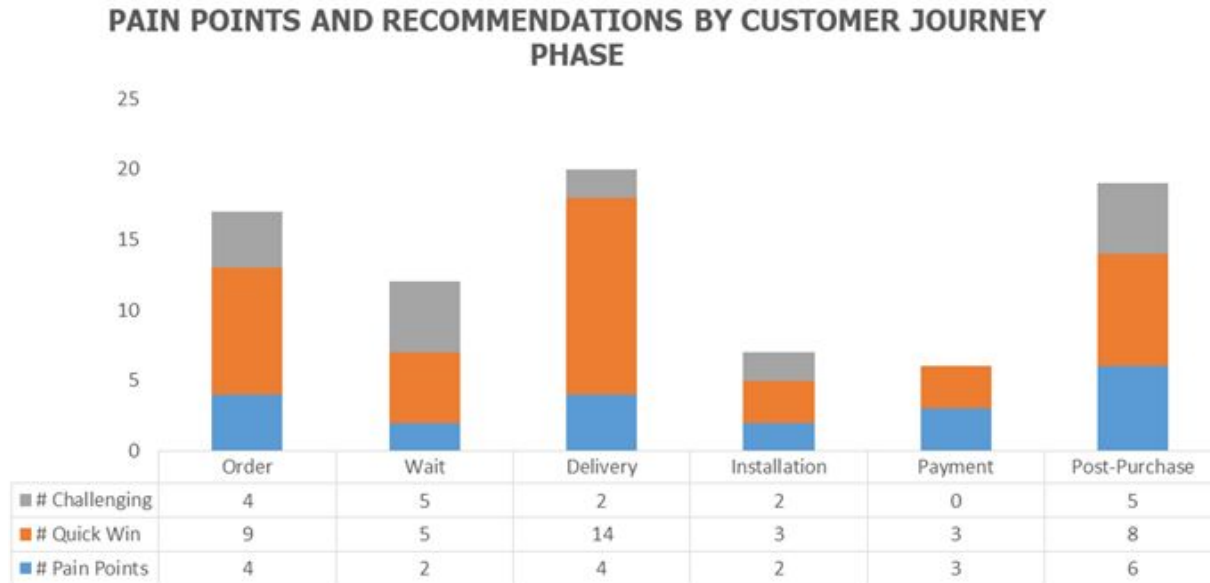
5. Recommendations

- 5.1. Recommendations by Customer Journey Stage and Pain Point
- 5.2. Ideal Customer Journeys

## **5.1.Recommendations**

Once identified the customer journey Pain Points, the team suggested initiatives to mitigate or overcome them. Those recommendations were made by stage and divided in quick wins and challenging initiatives.

## Pain Points and Recommendations by Customer Journey Phase



[1] Average impact of the recommendations in the pain point's resolution, by customer journey phase

[2] Some of the recommendations given to the online portal are also included in the Process

From the information summarized on the left it is possible to point out that:

**The delivery phase** has the higher number of recommendations made, especially quick wins;

**The Post - Purchase** is the stage where the customers experience more pain points and, therefore, the one with larger improvement possibilities;

Despite the low number of pain points in the **Wait and Installation phase**, there are still developments that can be done.

In the order phase, the first one, the pain points mentioned by the customers were the bottle's weight, the delivery service additional price, the reduced delivery periods and the lack of delivery on weekends.

## Recommendations by Pain Point - Order Phase

Order	Bottle's Weight	Provide a wheeled platform to facilitate the bottle's mobility at home.
		Tutorial: "How to properly transport the bottles?".
		LPG bottle filling system in clients' homes - particularly for houses and collective apartments (difficult to implement due to the portuguese law).
		New bottles made of lighter material such as stainless steel and iron alloys.
	Cost of Delivery Service	Complement the home delivery service with additional services, such as equipment and bottles' technical assistance with associated communication campaigns.
		Foster and promote the advantages of the home delivery service, justifying the extra cost.
		Occasional campaigns with delivery free of charge.
	Reduced delivery periods	Extend the working hours (8h-22h).
		Communicate the delivery service outside of the normal working hours as offered with an extra cost, known as the service fee.
		Define time periods with more requests and adapt the delivery time and the number of employees.
		Predict the end of the clients' gas, according to their usage history, and notify them by email or phone message.
	Lack of delivery on weekends	Hire part-time "piquetes" available to deliver during the weekend.
		Promote the advantage of ordering during the week - cheaper and faster.

The uncertainty of the exact delivery time and the long waiting times consist on the pain points of the wait phase.

## Recommendations by Pain Point - Wait Phase

Wait	Uncertainty of the exact delivery time	Option to set the delivery time for the same day and hour every month.
		"LPG Bottled's Uber": app that allows the client to order his LPG bottle, with real-time tracking of the distribution vehicle and the time left for the delivery be concluded.
		Option for the client to send SMS with the client's number and receive the estimated time left for his order to be delivered.
	Long waiting times	The client is informed, in advance, of the predicted waiting time and receives a discount or gift if it delays more than 1 hour.
		Option for the client to write on the portal the exact hour of the delivery.
		Split the distributors into two groups, one for orders made in advance and the other for the urgent ones, during peak hours.
		Bottle discount if the delivery delays more than one day.
		Improve the delivery logistic - predict the end of the gas of each consumer
		Order goes automatically for the nearest distribution car (GPS car track).
		Information on the portal of the time remaining for the distributor to arrive.



The limited delivery flexibility, the lack of distributors' sympathy, the lack of trust with the distributors and the insecurity with the reception of the distributors at home are the pain points pointed out in the delivery phase.

## Recommendations by Pain Point - Delivery Phase

<b>Delivery</b>	<b>Limited delivery flexibility</b>	Creation of the clients' profiles with their delivery preferences for better distributors' management.
		Hire part time distributors for the busiest periods (beginning and end of the day), particularly during the winter.
		Campaigns for clients to schedule the delivery in advance.
	<b>Lack of sympathy of the distributors</b>	Create bonus for the distributors with the best rating scores or the ones referred as the most friendly on the portal.
		Customer review of the distributors on the portal.
		Occasional monitoring of the distributor by the reseller, during the delivery act, to evaluate the practices in loco.
		Periodic meetings with the distributors to give feedback about their performance concerning the service to the client and propose improvements.
	<b>Lack of trust with the distributors</b>	Add to the portal each distributor's profile with the correspondent information - picture and name.
		Distributor's self presentation to the client, when he delivers for the first time, providing a brief explanation on the reason behind the distributor's change.
		Allocate areas/clients by distributor to assure always the same one.
		Option for the clients to choose the distributor on the portal or by phone (possible rerouting needed).
	<b>Insecurity with the reception of distributors at home</b>	Develop a manual for the distributors with customer service standards, including the right approach to the clients in the delivery.
		Inform the client the name of the distributor, that will deliver his bottle, when the order is confirmed
		Emphasize the option to deliver the bottle with the absent client.
		Add a badge with the name of the distributor to all the uniforms.
		Reformulation of the uniforms properly identified with brand Galp.

In the installation phase, the pain point of the accessories' bad quality and the lack of verification of the accessories validity were found.

## Recommendations by Pain Point - Installation Phase

<b>Installation</b>	<b>Installation of non-durable accessories</b>	Option for the client to exchange or get a refund in case of the accessories' malfunction (up to one month after the delivery).
	<b>Insufficient verification of the accessories' validity</b>	Personalized clients' profiles on the "GasOnline" Portal with the accessories' validity and automatic reminders by email or phone message when the expiration is approaching.
		Annual telephone calls to remember clients about the accessories' validity and conditions.
		Include the accessories' purchase on the portal (add-on with bottles) and register the validity on the clients' profile.
		Clients' booklet with individual dates of the accessories' validity verifications.

In the payment phase, the pain point tackled is the unavailability of the ATM terminal.

## Recommendations by Pain Point - Payment Phase

<b>Payment</b>	<b>ATM terminal unavailability</b>	Provide an ATM terminal in all the distribution trucks.
		Always ask the payment method which will be used by the client, and communicate it to the distributors.
		Allow the payment by bank transfer when there is no ATM terminal available (depending on the geographical area).

In the post purchase, the three pain points mentioned were the insecurity with having the bottles at home, the unpredictability of the end of the gas bottle and the bottle's poor state.

## Recommendations by Pain Point - Post Purchase Phase

Post Purchase	Fear of having gas bottles at home	Safety Tutorials Ex: "How to check if there is a gas leak and what to do during it?".
		Always refer the existence of free insurance.
		Add insurance stamp on the receipt, together with the already existing stamps of service quality.
	Unpredictability of the end of the gas bottle	Invest in reserve bottles' campaigns.
		Call or pass by clients' house regularly to know if everything is ok with the equipments and to ask if they eventually need gas.
		Analyse the customers' usage history and notify them, one week in advance, by phone message or email, when the gas is about to end.
		Develop a platform to transport the bottles with a scale incorporated.
	Bottles' poor state	Built-in chip on the bottles that quantifies the current gas level and shows it on a screen.
		Previous selection of the bottles in worst conditions for B2B and priority of new bottles for houses.
		Campaign with plastic covers for the bottles (initial offer) and option to personalize later.
		Search innovative products to clean the bottles - contest with resellers and distributors with prizes.
		The distributor should wipe the bottle with a soft dry cloth in front of the client, right before delivering it.
		Negotiate with CLC and Pergás the intensification and improvement of the bottles' cleanup process.

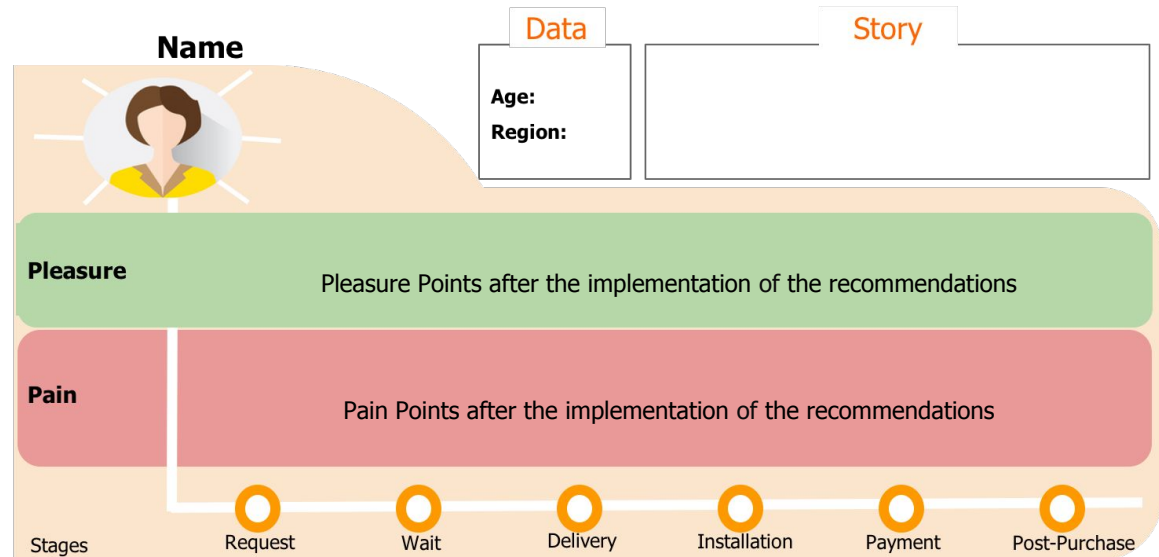
## **5.2.Ideal Customer Journeys**

The team designed the ideal customer journeys, that constitute the customer journey maps after the implementation of the recommendations.

## Ideal Customer Journeys

After implementing the recommendations, an impact in the pleasure and pain points experienced by each type of client will occur. As result, the team decided to re-create the customer journey maps for the personas, to demonstrate how their journey would be after performing the recommended actions.

They were named as ideal customer journeys, as they represent the experience the client would have if their pain points were solved and the pleasure points replicated.



Maria is inserted in the *CJ 1* (36,93% of the sample), representing the clients that order the bottle by **phone**, are **present** to receive it, **do not** request the bottle's **installation** and pay in **cash**.

## Ideal *CJ 1* - Standard Client

### Maria Dias



#### Data

**Age:** 65

**Region:** LVT

#### Story

Maria lives in an apartment and orders the butane 13kg bottle by phone call. She prefers to not have a reserve bottle due to space and budgetary issues. During the morning she is always at home, so she schedules the delivery for that period, whether it is during the week or the weekend. She always pays in cash and the installation of the bottle is made by her or by her husband.

#### Pleasure

**"It is easy to move the bottle with the little wheels."**

"I pay for the service but they provide assistance, it compensates."

"Already happened the bottle ending on Sunday and they delivered it."

**"My monthly order is fixed: always in the same day and hour"**

"Galp is fastest to deliver, when I order they come right away."

"I can't go get them, I am already an elderly person and I am grateful that they bring it to me."

#### Pain

"It is a bummer to have the bottles taking space in the marquise."

"The bottle when it is full has little power, so I have a hard turning on the stove at first."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase

Luísa is inserted in the *CJ* 1 (36,93% of the sample), representing the clients that order the bottle by **phone**, are **present** to receive it, **do not** request the bottle's **installation** and pay in **cash**.

## Ideal *CJ* 1 - "Pluma" Client

### Luísa Baptista



#### Data

**Age:** 54

**Region:**

North

#### Story

Luísa lives in an apartment, is client of "Pluma" and orders it by phone. She likes to have a reserve bottle and prefers to schedule the delivery for late afternoon, when she comes back from work. She is not very demanding with the delivery speed and she feels at ease to install the bottle alone. Pays in cash and during the delivery, sometimes, she gives a tip to the distributor.

#### Pleasure

**"I always pick the distributor I prefer through the portal."**

"I do not have a means of transport, so it suits me to ask them to bring it home."

"Even if I pay 1 € more I prefer it, I do not have time to go pick the gas bottle."

**"When my accessory failed due to bad quality, they immediately provide me a new one."**

#### Pain

"I do not like having gas bottles at home. I am very scared, it is a danger."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase



José is inserted in the *CJ 2* (19,71% of the sample), representing the clients that order the bottle by **phone**, are **present** to receive it, **request** the bottle's **installation** and pay with **cash**.

## Ideal CJ 2 - Installation Client

### José Silva



#### Data

**Age:** 70

**Region:**  
North/Centre

#### Story

José lives in a house and requests his propane of 45kg by phone, being willing to wait for the delivery, since it has a reserve bottle. He is at home during the delivery, sometimes on the weekend, paying right away in cash. He trusts completely in the distributor and in his recommendations.

#### Pleasure

"They always have it available in the truck and they bring it on the time. I even ordered one on Christmas Day."

"As it is a 45kg bottle, it is impossible to bring in the car. So I do not have that concern!"

"He makes recommendations about the installation and changes the tubes when needed."

"When they leave the bottle, they always check if everything is in order, especially the validity of the piping."

"It has no disadvantages. I do not pay for the service."

**"The small screen/monitor in the bottle is useful to control the gas available."**

"The bottles I used before looked like they came empty and the ones from Galp last a lot longer."

#### Pain

"The price is very high, it takes a large amount per month."

"Compared with Spain, the price is the double. They always say it is going to decrease but it is getting more expensive."

"The bottles are very old and have rust."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase

Adelaide is inserted in the *CJ 3* (12,48% da amostra), representing the clients that order the bottle by **phone**, are **present** to receive it, **do not** request the bottle's **installation** and pay with **card**.

## Ideal CJ 3 - Card Client

### Adelaide Ferreira



#### Data

**Age:** 65

**Region:**

Undefined

#### Story

Adelaide asks for her butane bottle by phone and makes a point of having a reserve bottle, to not be taken by surprise. She doesn't like to wait more than 24 hours for the deliver. Adelaide is always at home during the morning, until lunch time, to receive the bottle. Prefers to pay right away with her bank card and, due to the distributor's friendliness, she normally gives a tip.

#### Pleasure

"They are always available, every day at every hour."

"I always know the exact time they will deliver my order, because I can see on the portal the time left for they arrive."

"They know perfectly my availability and kindly adapt to it."

"They bring it to the house and I avoid going to pick it up. Do you imagine the inconvenience of having to carry the bottle?"

"The people are friendly and attentive."

"They always ensure my accessories conditions. They also gave me a booklet so I can keep track of the verification dates"

"Look, I've been buying it there for almost 50 years, it is like family."

#### Pain

"I would like to have piped gas, it is more comfortable."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase

Ricardo is inserted in the *CJ 4* (7,69% da amostra), representing the clients that make the order for the bottle **on-site**, are **present** to receive it, **do not** request the bottle's **installation** and pay in **cash**.

## Ideal CJ 4 - Absent Client

### Ricardo Adão



#### Data

**Age:** 44

**Region:**

Centre

#### Story

Ricardo has the habit of visiting the store to order the butane 13kg bottle, and asks for the deliver to be done in the morning, when he is still at home. He makes the payment when he places the order, in cash, using occasionally bank transfer. He has no spare bottle and prefers to install the bottle himself.

#### Pleasure

"The new website allows online orders, there is no need to go to the shop anymore."

"It is possible to choose the distributor I prefer. I pick always the same."

"I once had to pay by bank transfer and there was no problem."

#### Pain

"Nothing assures me that the bottle has not yet been used, having the sealant doesn't convey sufficient confidence."

Stages



Order



Wait



Deliver



Payment



Post-Purchase

Paula is inserted in the *CJ 5* ( 7,40% of the sample), representing the clients that order the bottle by **phone**, are **absent** during the delivery, **do not** request the bottle's **installation** and pay in **cash**.

## Ideal CJ 5 - Absent Client

### Paula Matias



#### Data

**Age:** 44

**Region:**

Centre

#### Story

Paula prefers to order the bottle by phone, but sometimes she goes to the store. She buys butane 13kg and chooses to not have one in reserve, since she has always two bottles in use. She is flexible with the delivery, since she is not usually present to receive the bottle. Pays in cash before or after the delivery, but sometimes pays with credit card or bank transfer.

#### Pleasure

"When I order during the weekend they deliver on the same day."

"I do not have to be at home."

"I like it because they deliver it at home and I do not have to worry about picking it up."

"It is possible to pay using card, and when I order they always ask which kind of payment method I prefer."

"Now the bottles are cleaner and looking better."

"The distributor is already part of the furniture."

#### Pain

"I would like if there was more prior information about the price increases ."

Stages



Order



Wait



Delivery



Installation



Payment



Post-Purchase